REN
SUCCESS SYSTEM

REACH • ENGAGE • NURTURE

The Ultimate Playbook to Turbocharge Your Marketing, Sales, and Agent Attraction with an AI-Powered Growth Plan

ISAIAH COLTON

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Acknowledgments

A Big Shout-Out to the REN Team, Partners, and Family Who Never Stopped Believing in the REN Vision—Thank You All!

First, I want to extend my deepest gratitude to my incredible wife. Her unwavering strength and support kept me going, even during moments when I felt like giving up. This journey has been immense and often overwhelming, but her belief in me pushed me across the finish line.

To my dad and family—thank you for instilling in me the values of hard work and perseverance. My dad's example of balancing grit with compassion—whether on the farm or in life—has been my guiding light. His spiritual and practical wisdom has shaped so much of who I am today.

Finally, to the REN Team—this success belongs to all of us. Your hard work, belief, and commitment are turning our dream into something extraordinary. Together, we are proving that AI and proven success systems can truly revolutionize the way business owners achieve success.

Thank you from the bottom of my heart!

The Turning Point: From Chaos to a System for Success

In the early days of running our business, we were drowning in leads. Sometimes, there were so many that we couldn't keep up, and valuable opportunities fell through the cracks. Other times, we were closing deals, but our clients disappeared once the transaction was complete. Referrals? Testimonials? Repeat business? They were few and far between because we weren't nurturing those relationships or staying top of mind.

We realized we were working harder than ever but not seeing the results we wanted. Momentum slowed, and our business plateaued. Why? **We had no system for database marketing, no streamlined process for lead conversion, and no strategy to turn satisfied clients into raving fans who fueled our growth.**

The wake-up call came when we missed out on a major referral opportunity. A past client raved about our service to someone in their network, but because we hadn't stayed in touch, the referral went to a competitor who had better follow-up systems in place. It stung.

We knew we had to fix this—not just for ourselves but for the countless other businesses struggling with the same issues.

The Search for a Better Way

As we dug deeper, we discovered the **flywheel model** and saw the potential to transform how we operated. Unlike the traditional sales funnel—which focuses on one-way lead generation and closing deals—the flywheel thrives on momentum. Every satisfied client spins the wheel, creating new business through referrals, testimonials, and repeat engagements.

We also became obsessed with adding people and maintaining relationships from contact information updates, to quality lead scores, to always making sure we were growing our database in as many ways as possible.

After running into a massive technical challenge, having to work in 7-10 different tools and systems to make our plan work, we decided there had to be a better way to execute this business plan. So we did not stop with just coming up with a blueprint. To truly solve the problem, we needed a comprehensive solution that combined cutting-edge technology with proven strategies. That's when we created **REN 360**, an **AI-powered operating system (OS)** that revolutionized how we approached database marketing, lead generation, lead conversion, client success, and business growth.

Introducing REN 360

REN 360 is more than just a tool—it's the foundation of our success. It combines the power of AI with a **proven marketing plan** to create one outcome: **cash**.

Here's what REN 360 does:

1. **Database Marketing:**
   REN 360 centralizes all your client and lead data, categorizing them by stage (hot, warm, or cold) and automating personalized follow-ups. It ensures that no lead or client ever falls through the cracks.
2. **AI-Powered Lead Generation:**
   Using advanced AI, REN 360 identifies high-potential leads and engages them with precision-targeted outreach. By analyzing behaviors and patterns, the system prioritizes leads that are most likely to convert.
3. **Lead Conversion Systems:**
   REN 360 provides step-by-step processes to nurture leads effectively, including automated text and email campaigns, follow-up reminders, and proven sales scripts to close deals faster.
4. **Client Success:**
   REN 360 enhances the client experience through personalized communications, automated check-ins, and post-sale follow-ups, turning satisfied clients into long-term advocates.
5. **Business Growth:**
   What sets REN 360 apart is its ability to generate referrals, testimonials, and repeat business. It creates a system where every client interaction drives sustainable growth.

What Makes REN 360 Unique

1. **AI-Driven:** REN 360 leverages cutting-edge AI technology to streamline processes, predict outcomes, and optimize performance.
2. **Proven Sales and Marketing Plan:** It doesn't just provide tools—it's built on proven strategies that work. Together, the AI-powered OS and marketing plan create a formula for success: **AI powered Operation System + Proven Plan = Cash.**
3. **Elite Coaching Program:** REN 360 comes with the **REN Success System**, an elite coaching program developed by top 1% industry experts. It offers actionable insights and best practices to maximize results.

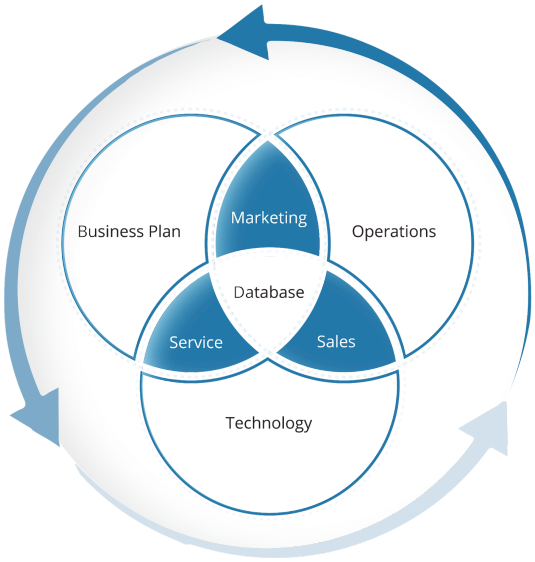
The Results

Once we implemented REN 360, everything changed. Leads that used to slip through the cracks were now nurtured automatically. Clients who might have forgotten us became repeat customers and active advocates for our brand. Referrals increased, and testimonials poured in.

Most importantly, the system gave us back control. Instead of scrambling to keep up with day-to-day tasks, we had a scalable process that allowed us to focus on growth.

Our Mission

During this transformation, we discovered a startling statistic: **90% of business owners struggle with being able to run a business that generates systematic results and actually grows to 7 figures and beyond**, leaving billions of dollars in potential revenue on the table.



We made it our mission to solve this problem—not just for ourselves but for the millions of businesses that face the same challenges. REN 360 is our answer. It's not just about generating leads; it's about building meaningful relationships, creating advocates, and achieving sustainable growth.

Passive Revenue Stream

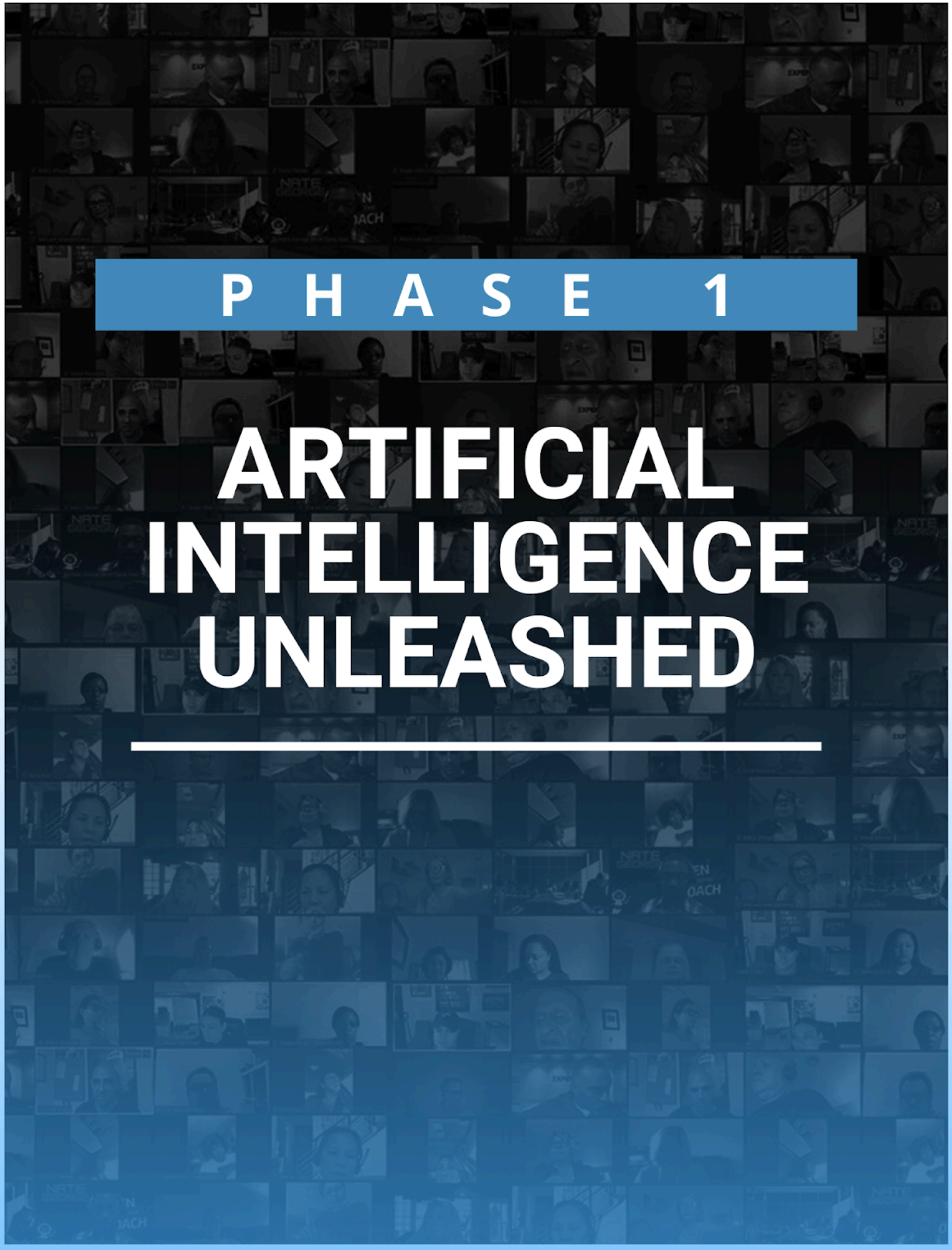
In addition to transforming your business operations, REN 360 offers an incredible opportunity to generate **extreme streams of income** and even create a significant **passive revenue stream**. Through its innovative referral partner system, users can earn by bringing other businesses into the ecosystem, getting paid not only for their direct referrals but also when those referrals bring in others.

This **multi-level referral structure** ensures you earn a percentage from the activity of your network at every level. Moreover, income doesn't stop at sign-ups—you also earn recurring revenue based on the ongoing **usage of the services** by your referrals and their networks. This means that as your network grows and the usage of REN 360 increases, your passive income continues to scale, creating a long-term, compounding revenue stream. It's a model designed to reward growth, collaboration, and consistent engagement, making it a true game-changer for financial freedom.

The Future

Today, REN 360 isn't just a tool for our business—it's a solution for an industry-wide problem. We're helping businesses break free from the chaos of traditional models and empowering them to build momentum that never stops.

The flywheel isn't just a model for success; it's a way of doing business that works. And with REN 360, anyone can implement it.



PHASE 1

ARTIFICIAL INTELLIGENCE UNLEASHED

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CHAPTER 1

The REN Success System

A New Way to Build A Multi-Million Dollar Business

How AI, Alongside a Modern-Day Growth Plan Called the REN Flywheel Sales Funnel, Can Become Your Secret Weapon to Build a 7, 8, or 9-Figure Business

CHAPTER 1: The REN Success System

A New Way to Build a Multi-Million Dollar Business

"The secret to scaling isn't just about doing more—it's about doing things smarter, with systems that multiply your efforts and compound your results."

The Big Idea

The traditional sales funnel is setting you up for failure. It's a simple process: generate leads, nurture them, and close deals. But if you think closing a deal means you've "won," you're thinking too small.

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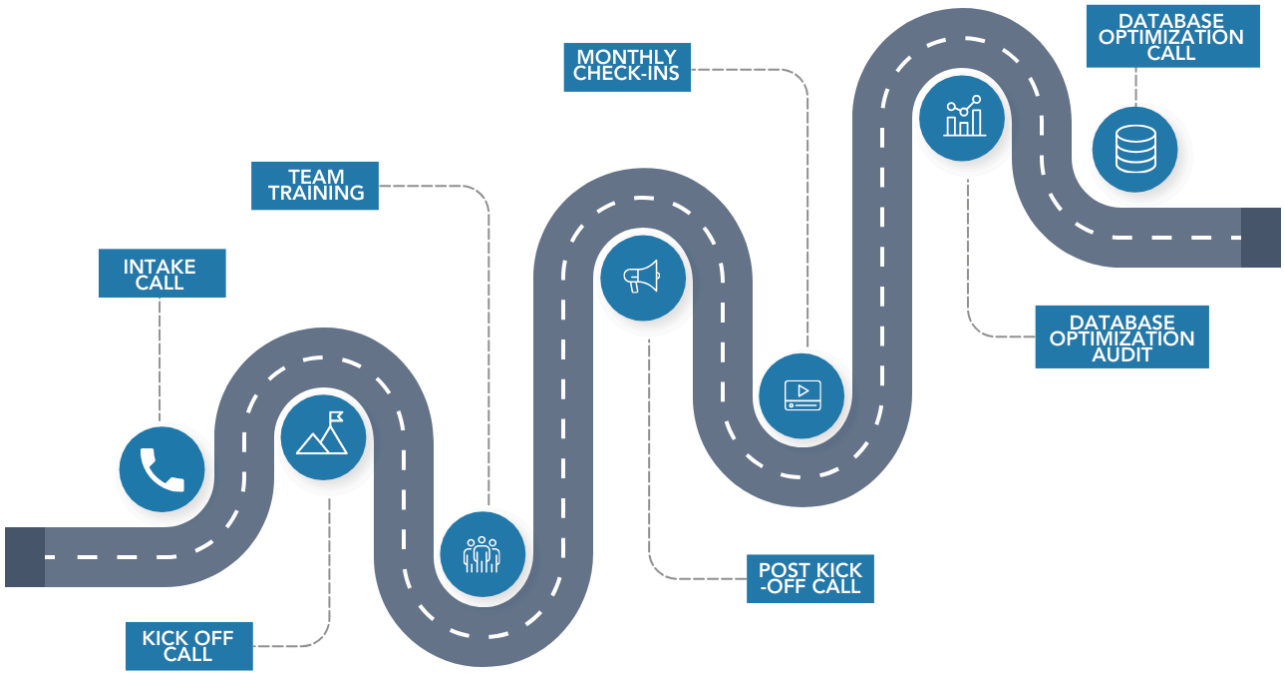
The **REN Success System** introduces a new way of thinking—a dynamic system that turns your business into a self-sustaining growth engine. Instead of focusing solely on closing deals (though yes, deals are essential), this model prioritizes creating long-term advocates. By shifting the focus to building relationships and advocacy, your business gains momentum over time, resulting in exponential growth.

Your database is your most valuable asset. When you look at the most successful businesses—whether globally recognized brands or the top performers in your local market—they're all using a similar approach. They may not call it the REN Sales Funnel, but this is exactly what they're doing. They are deeply focused on understanding what their prospects and clients are thinking and feeling at every stage of the journey—short, medium, and long term.



Here are some stats to get you started…

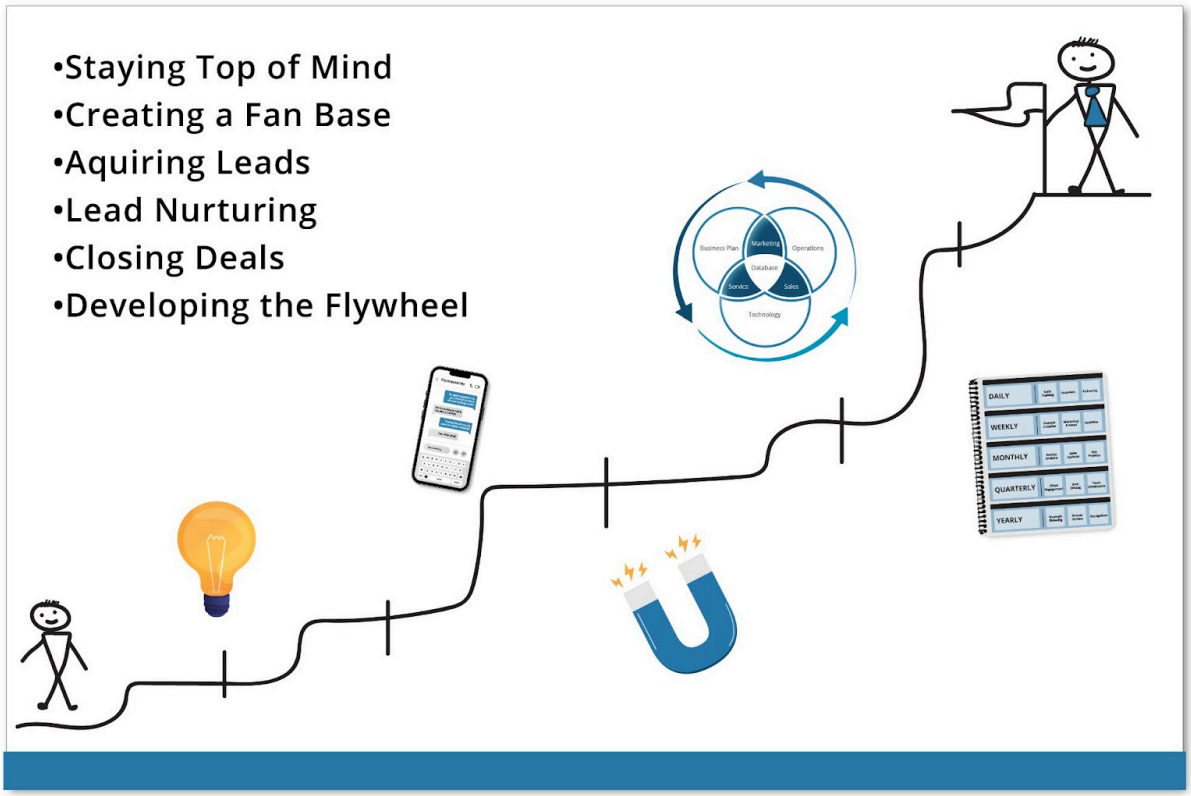
Key Stats

- **85% of buyers and sellers say they would use their real estate agent again, yet only 25% actually do.** *(Source: National Association of Realtors (NAR), 2022)*
- **Businesses that implement the flywheel model report up to 37% higher client retention rates compared to those using traditional funnels.** *(Source: HubSpot, "The Flywheel Model and Why It Outperforms the Funnel," 2021)*
- **Referrals are 4x more likely to convert than cold leads.** *(Source: Nielsen, "Global Trust in Advertising Report," 2021)*

How My Obsession with This Model Began

Everything I was ever trained to do in sales—and in the early days of my real estate business—was focused on running it like most others: **chasing leads and closing deals.** I'd hand off the deal and treat every transaction like the finish line, pouring all my energy into acquiring new clients while neglecting the relationships I had already built.

Then one day, I got a referral call from a past client—someone I hadn't spoken to in over a year. That's when it hit me: I had done nothing to stay top-of-mind, yet this client still remembered the great experience they had working with me. And it made me wonder: *What if I had proactively kept in touch?* How many more referrals could I have generated?



How many clients could I have turned into lifelong advocates—or even into part of my team?

Around this time, I came across a piece of research that stuck with me**: If you have just 100 raving fans, you'll never have to worry about money again.** Ok! That was my lightbulb moment.

That's when I discovered the flywheel model. Instead of just acquiring leads and closing deals, I shifted my focus to nurturing every client relationship like an ongoing partnership. I built systems to re-engage past clients, consistently asked for referrals, and turned happy customers into raving fans. I doubled down on database management, lead generation, lead conversion, client experience, and maximizing referrals.

The result? My lead generation became easier, my pipeline stayed full, and my business became more profitable than ever.

referral call

Tactical Breakdown: Flywheel vs. Funnel

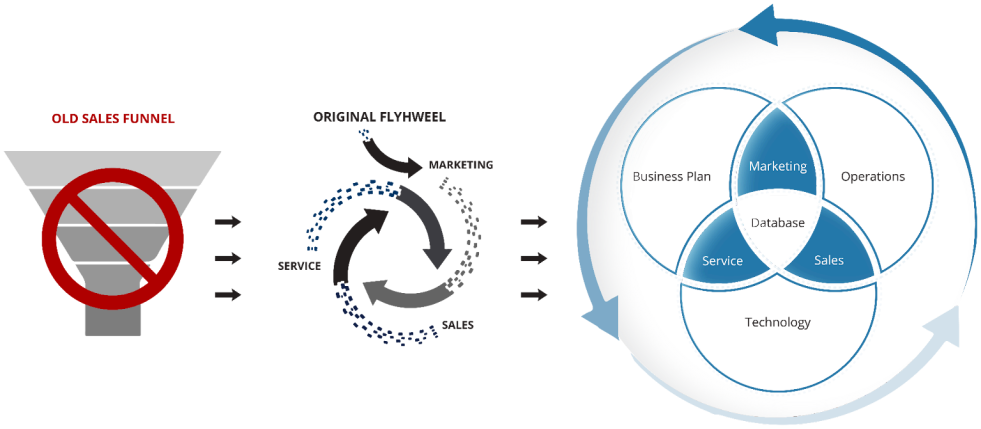
The Old Way: The Funnel

- **Top of Funnel (TOFU):** Generate leads through cold calls, ads, or open houses. The focus isn't on adding value—just on getting as many leads as possible.
- **Middle of Funnel (MOFU):** Nurture leads with follow-up calls and emails, but the messaging often feels pushy or insincere, driven by "commission breath."
- **Bottom of Funnel (BOFU):** Close the deal, but the client doesn't have the right expectations set for their long-term journey with you.

The New Way: The Flywheel

- **Reach:** Use targeted marketing, social media, and personalized outreach to attract leads. The goal is to connect with the right people by adding real value.

- **Engage:** Build meaningful relationships by providing value through helpful content, expert advice, and timely, authentic communication. Ensure your clients have a clear path to success.
- **Nurture:** Go beyond the transaction—create an exceptional client experience that leaves a lasting impression and makes clients feel cared for at every stage.
- **Growth:** Turn happy clients into advocates by actively asking for referrals, testimonials, and repeat business. Most importantly, teach your sales team to follow the same process, creating a cycle of sustainable growth.



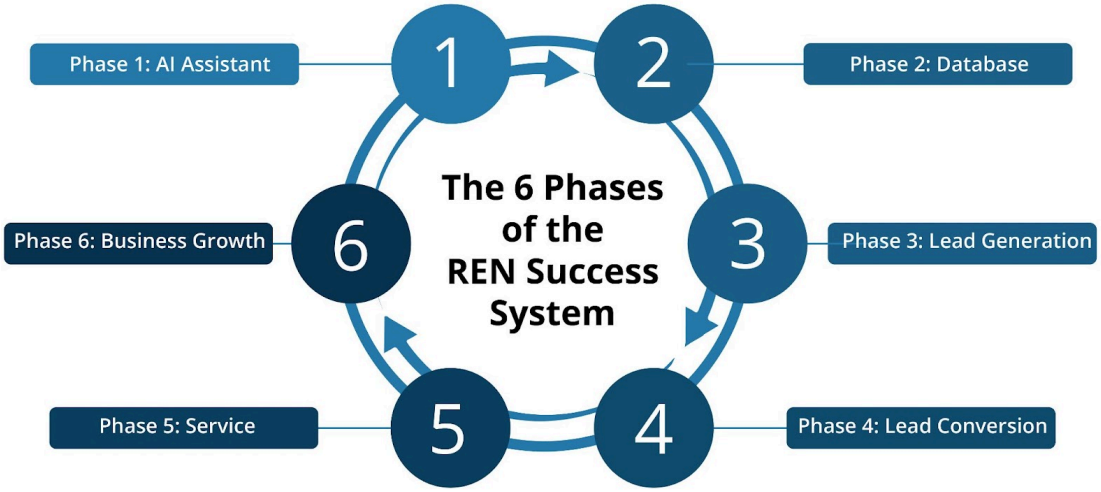
By the way, it works the same with your sales agents. The best salespeople often come from referrals—from people they know and trust.

Key Difference: Unlike the funnel, which ends at the close, the flywheel continues to build momentum by feeding energy back into the system. This creates sustainable, scalable growth that doesn't rely on constantly starting from scratch.

Mastering the REN Flywheel Sales Funnel: How to Execute and Scale This Proven Business Model

The REN Flywheel isn't just a theory—it's a system. It's broken down into six steps, each designed to maximize momentum and prevent breakdowns as you scale:

1. **Building Your AI Assistant (Phase 1)**
2. **Database: Your Most Valuable Asset (Phase 2)**
3. **Lead Generation: Leading with Value (Phase 3)**
4. **Lead Conversion: Engage to Build Trust and closing deals (Phase 4)**
5. **Service: Deliver an Experience (Phase 5)**
6. **Growth: Tracking Results, Building a team to follow 1-5 (Phase 6)**



Business Evaluation Scorecard

This scorecard is designed to help you assess the effectiveness of key systems in your business that directly contribute to growth, customer retention, and long-term success. The scorecard evaluates 5 core systems: **Database Management and Marketing System**, **Lead Generation Systems**, **Lead Conversion Systems**, **Client Success Systems**, and **Business Growth Systems**.

For each system, you'll rate your business on a scale from **1-5** (1 = Needs Significant Improvement, 5 = Excellent and Highly Effective). At the end, the scorecard will give you a snapshot of the areas to focus on for improvement.

1. Database Management and Marketing System

Does your business have a detailed, organized database management system in place? Is your marketing system integrated and optimized for customer engagement?

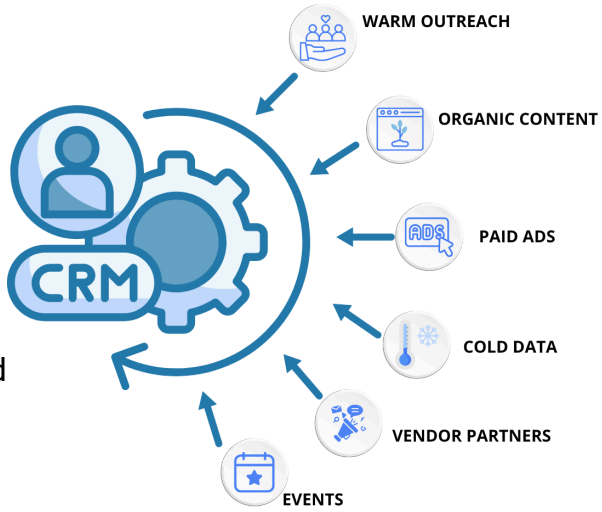
- **1:** No formal database. Marketing efforts are fragmented, uncoordinated, and reactive.
- **2:** Basic database system with some marketing automation tools, but lack of integration.
- **3:** Database is organized, with some automation in place, but the marketing system could be more data-driven and strategic.

- **4:** Strong, integrated database system with automated marketing campaigns that track engagement and segment audiences.
- **5:** Comprehensive, highly organized database with advanced analytics, fully integrated marketing automation, and data-driven decisions.

Score: [ ]

2. Lead Generation Systems

How effectively does your business generate leads? Are you using the most efficient channels and strategies to attract potential customers?



- **1:** No consistent lead generation strategy or reliance on word of mouth.
- **2:** Basic lead generation strategy (e.g., ads or website forms), but leads are inconsistent and unqualified.
- **3:** Multiple lead generation channels (social media, content marketing, paid ads) with decent results, but no clear system to capture and nurture leads.
- **4:** Strong lead generation system in place with consistent qualified leads coming through multiple channels, including inbound and outbound efforts.
- **5:** Fully optimized, multi-channel lead generation system with high-quality leads that consistently convert, and clear tracking of lead sources.

Score: [ ]

3. Lead Conversion Systems

Once leads are generated, how efficiently does your business convert them into paying customers? Do you have a structured sales process?

- **1:** No structured sales process; leads often fall through the cracks.
- **2:** Basic sales process, but lack of follow-up or qualification, leading to lost opportunities.
- **3:** Well-defined sales process with lead qualification and some follow-up, but inconsistent conversion rates.
- **4:** Well-oiled, structured sales process with clear lead nurturing, follow-up systems, and good conversion rates.

- **5:** Highly efficient, automated lead conversion system with personalized follow-ups, CRM integration, and consistently high conversion rates.

Score: [ ]

4. Client Success Systems

How effective is your business at ensuring customer satisfaction, loyalty, and ongoing success? Do you have systems in place to manage relationships and create repeat customers?

- **1:** No formal client success strategy. Little focus on retention or long-term customer relationships.
- **2:** Basic client support system, but little focus on customer engagement, feedback, or retention.
- **3:** Client support and retention are prioritized, but there's room for improvement in engagement and relationship-building.
- **4:** Strong client success systems with regular check-ins, support, and clear focus on customer satisfaction and retention.
- **5:** Comprehensive client success program that focuses on proactive engagement, customer satisfaction surveys, and a high rate of repeat business and referrals.

Score: [ ]

5. Business Growth Systems

Does your business have a comprehensive, scalable system in place to drive long-term growth? Are you actively planning for the future, adapting to changes, and seizing new opportunities to fuel expansion?

1. Recruiting Top Talent - Do you have a flywheel sales funnel to recruit top talent?
2. Do you have strong standard operating procedures to make sure everyone executing business plans follows a proven process with you needed to be involved?
3. Do you have a budget and metrics that track the Business health fails to make sure you don't have blind spots slowing your growth down?
4. Are you legally compliant with your sales and marketing and other strategies with the new TPCA laws?
5. Do you have a world culture that focuses on value, mission, providing great service leading to referrals and not just new leads, and new business?

Score: [ ]

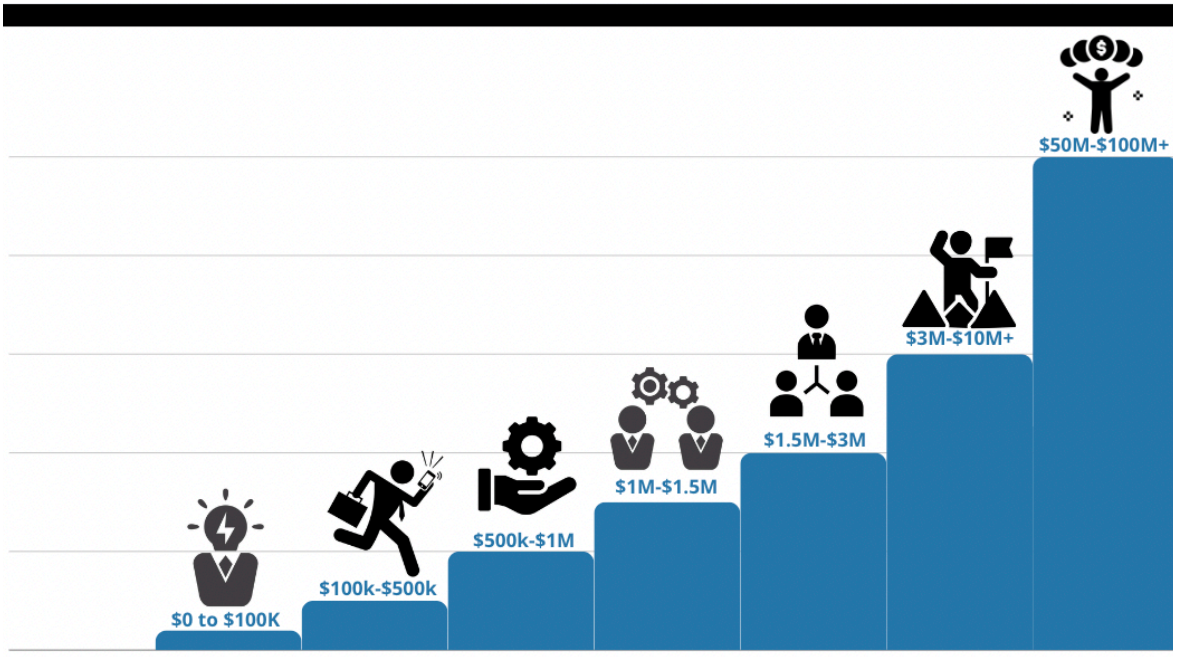
Evaluation Summary

After scoring each of the 5 categories, calculate the **total score** out of 25. Then, evaluate where your business stands:

- **21-25: Highly Effective** – Your business has established strong, efficient systems that support growth and sustainability. Focus on scaling and optimizing further.
- **16-20: Good Progress** – You have many effective systems in place, but there are areas that can be optimized for greater impact. Focus on streamlining processes and improving efficiency.
- **11-15: Room for Improvement** – While some systems are functioning, significant work is needed to optimize key areas such as lead generation or client success. Prioritize improving these systems.
- **6-10: Critical Improvement Needed** – Your business is struggling in key areas. It's time to overhaul your systems to ensure long-term sustainability and growth.
- **1-5: System Overhaul Required** – Urgent attention is needed to build or improve foundational systems. Without a significant investment in restructuring these areas, future growth will be hindered.

Next Steps:

Based on your scores, prioritize improvements in the systems where your business is scoring the lowest. This could include refining marketing efforts, implementing more



robust lead conversion tactics, enhancing client success programs, or focusing on growth strategies.

Remember, **business success is a journey**, not a destination. Consistently evaluating and optimizing your systems will ensure that your business is positioned for sustainable, long-term growth.

Focus on going through each phase methodically even if you don't think that area of the flywheel is as important to you. They all build on each other. **Every 90 days, press the reset button and grade your business again against this model.**

Calibrate, keep yourself plugged in, and apply the 1% rule — if you improve by just 1% consistently, those small gains will add up to remarkable improvement.

Growth without a system is chaos. If you only focus on one part of the flywheel (like lead gen) and neglect the rest, your business will eventually break down. If you have a short term mindset and you're not committed to going through this over the course of 90 days, then doing it again, and again, and again, then you're not going to have the success you want.

The **REN Success System** transforms your business into a momentum-building machine. By focusing on your AI assistant, database, generating value-driven leads, engaging them, delivering exceptional service, and tracking results, you create a system that scales effortlessly.

- **People:** As you review your Business Scorecard, you'll likely discover that many of your challenges can be addressed by adding the right team members. Consider hiring for one or more of these key roles:
    - **Marketing Assistant**
    - **Inside Sales Assistant**
    - **Transaction Coordinator**
    - **Showing Assistant**
    - **Tech Assistant**
    - **Operations Manager**

  Once you've identified your team's gaps, log into your REN 360 software to explore how to optimize your workflow and fully leverage these roles within your business.

- **Process:** Scaling your business effectively requires mastering **time blocking** and **project management**. These skills are essential for reaching the next level. If this is an area where you struggle, start by reading the *Productivity Secrets* chapter—it's full of actionable strategies that can transform the way you manage your time and projects.
- **Tools:** REN 360 is more than software—it's a fully integrated **operating system** for managing your database, lead generation, lead conversion, client success, and business growth.
- REN Success System/ Growth CEO - Resources

1. **Complete Your Business Scorecard**
2. **Sign Up To REN 360**
3. **Timeblock 15 - 30 minutes every day to review the 6 phases on your REN 360 Dashboard and in this Playbook.**
4. **Go to www.10xmylistings.com to schedule a demo and see what package works best for you.**

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CHAPTER 2

Programming Your AI Assistant

Why Your AI Assistant is the Secret to Scaling Your Business

CHAPTER 2: Programming Your AI Assistant

Why Your AI Assistant is the Secret to Scaling Your Business

"Building your AI Assistant isn't just about technology—it's about designing a 24/7 partner that works relentlessly to grow, scale, and sustain your business.
Let's get started!"

Big Idea:

Imagine having a tireless assistant who works 24/7, personalizing communication for every lead, automating repetitive tasks, and giving you time to focus on high-leverage activities like closing deals and building relationships. That's the power of programming your AI Assistant within REN 360.

But here's the kicker: You don't just want *any* AI. While tools like ChatGPT and other general-purpose platforms are powerful, they lack one crucial feature: they aren't tailored to your business, your goals, or your customers. That's where the **REN AI Assistant** stands out—it's designed to integrate seamlessly with the REN Success System, maximizing the momentum of your Flywheel.

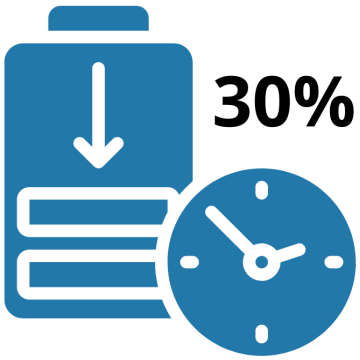
At the heart of this system lies a critical first step: **Answering 25 Key Questions** and uploading the responses into the AI Assistant. These questions build the foundation for how your AI thinks, responds, and interacts on your behalf. This is the most important phase because it powers every other aspect of your assistant's functionality.

When you program your AI Assistant this way, you're creating a scalable, repeatable system that:

- Saves time by automating tasks like follow-ups and personalized outreach.
- Drives revenue by nurturing leads with precision.
- Delivers consistent messaging aligned with your brand.

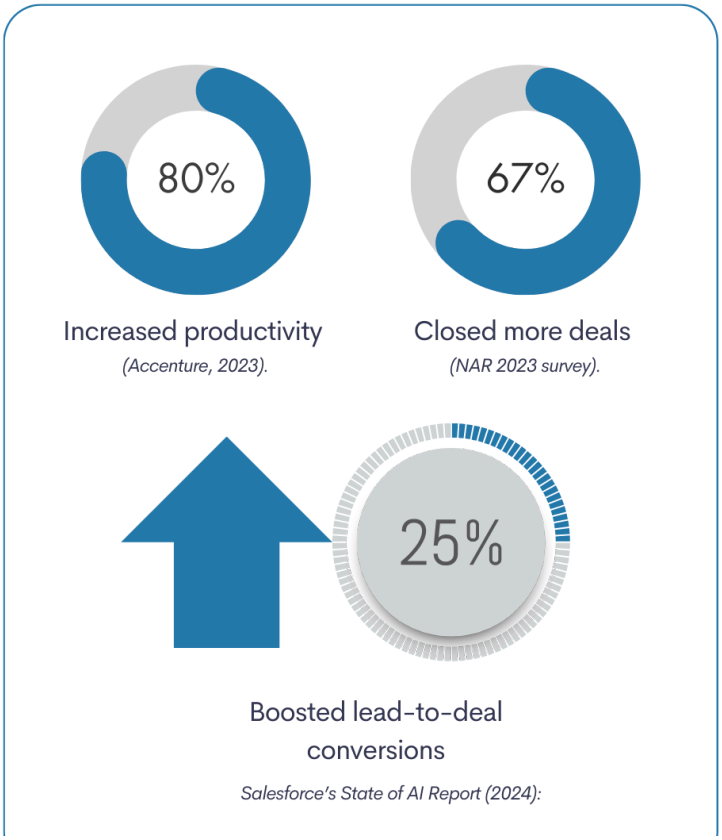
1. AI-Driven Growth Projections

- Businesses leveraging AI for lead generation and customer engagement experience up to **40% faster revenue growth** compared to those using traditional methods (source: McKinsey).
- **79% of high-performing companies** use AI to personalize customer interactions, leading to increased conversions and customer loyalty (source: Salesforce).
- Companies using AI assistants see a **30% reduction in time spent on repetitive tasks**, allowing teams to focus on high-impact activities like closing deals and building relationships (source: PwC).



2. Efficiency and Cost Savings

- By automating follow-ups, FAQs, and database management, businesses report saving an average of **20-30 hours per week per employee** (source: Deloitte).
- Businesses integrating AI assistants into their workflows experience a **50% increase in lead conversion rates**, thanks to timely, personalized communication (source: Gartner).



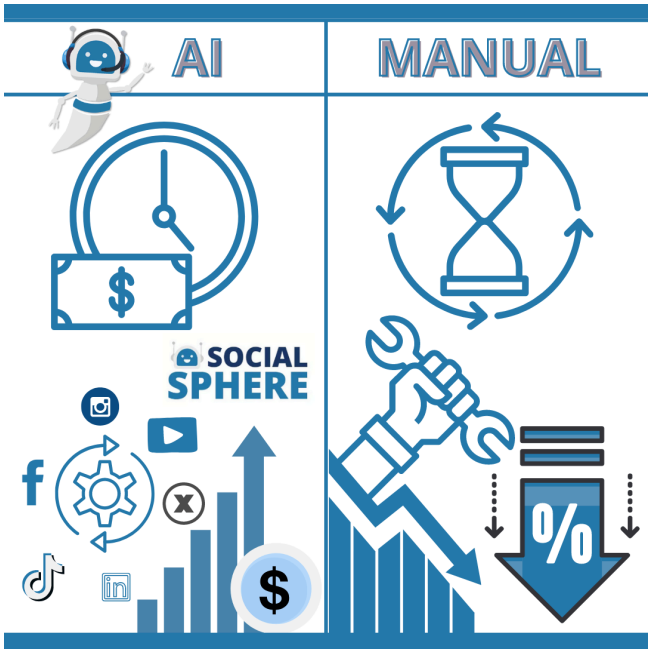
3. The Future of AI in Business

- The AI-powered virtual assistant market is projected to reach **$52 billion by 2028**, with businesses across industries racing to adopt these tools (source: Allied Market Research).
- **85% of business leaders believe AI will give their companies a competitive edge**, with early adopters already dominating their markets (source: Forbes).

4. Why It Matters for You

If you're not using AI, you're leaving money on the table. By programming your REN 360 AI Assistant, you'll:

- Increase revenue by **streamlining your sales Flywheel** and nurturing leads with precision.
- Save thousands of dollars by automating repetitive tasks instead of hiring additional team members.
- Stay ahead of competitors by leveraging cutting-edge technology tailored to your business.

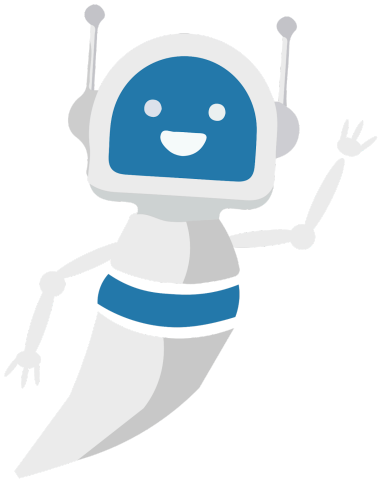


Bottom Line: Businesses that embrace AI assistants see faster growth, lower costs, and better results. REN 360 isn't just giving you AI—it's giving you a strategic advantage to dominate your market.

And the best part? You don't need to be a tech genius to do it.

Why We Built an AI Assistant

When I first began using AI in my business, I thought I had unlocked the future. Tools like ChatGPT felt revolutionary—ask a question, get an answer, generate ideas. But very quickly, I realized something was missing. As incredible as these tools were, they weren't *mine*.



They didn't understand my audience, my systems, my business goals, or my values. As a result, they produced content without applying the best practices of value-based marketing or business building—and it showed. The content lacked authenticity and failed to align with my vision. Every interaction felt like starting from scratch, and I ended up spending more time explaining what I needed than actually making progress.

That's when it hit me: **I needed an AI tailored to my business.**

The Problem: Generic AI Wasn't Enough

Using generic AI was like trying to fit a square peg into a round hole. It couldn't understand the nuances of my Flywheel—the stages of **Reach**, **Engage**, and **Nurture** that powered our growth. It couldn't adapt to the unique needs of our business or our clients.

I needed more than a tool—I needed a partner that could think strategically, act purposefully, and grow alongside us.

Why REN 360's AI Assistant Beats Generic AI Tools

1. Fully Integrated with the REN Success System

- Unlike standalone tools, the REN 360 AI Assistant is designed to work seamlessly with the REN Flywheel Sales Funnel. It knows how to manage your database, optimize lead generation, and automate nurturing.

2. Tailored to Your Business

- You program it with your specific processes, offers, and customer profiles. Generic AI doesn't know your goals—REN 360 does.

3. Saves You Time and Hassle

- Stop spending hours tweaking prompts and responses. The REN 360 AI Assistant is built to understand your systems from day one.

4. Drives Consistency

- Your brand voice, messaging, and offers stay consistent across every touchpoint—something general AI platforms can't guarantee.

5. Secure and Proprietary

- Your data stays within REN 360, so you're not sharing sensitive business information with an external platform.

What REN and the REN 360 Software Can Accomplish Today

The REN AI Assistant is already revolutionizing how businesses operate. Here's what it can do right now:

1. **Automate Lead Management**: Automatically categorize leads (cold, warm, hot), send personalized follow-ups, and schedule appointments.
2. **Generate Tailored Content**: Create emails, social media posts, ad copy, and scripts based on your Flywheel stages (Reach, Engage, Nurture).
3. **Provide Behavioral Insights**: Analyze customer actions to predict readiness to buy or engage.
4. **Streamline Workflows**: Automate repetitive tasks, such as lead nurturing and onboarding processes.
5. **Centralize Tools**: Sync with your CRM and consolidate systems into one all-in-one dashboard.
6. **Make Strategic Recommendations**: Suggest next steps based on where leads or customers are in the Flywheel.
7. **Manage Ads Effortlessly**: Design and launch high-performing ads on platforms like Google and Facebook in minutes.
8. **Communicate Effectively**: Send personalized emails, texts, and voicemails to maintain meaningful client relationships.

What REN and the REN 360 Software Will Be Able to Do in the Future

Our roadmap for the REN AI Assistant includes capabilities that push the boundaries of automation and intelligence:

1. **Full Autonomy**: Handle entire sales and marketing campaigns, from lead generation to closing, without human oversight.
2. **Emotional Intelligence**: Detects and responds to customer sentiment for deeper, more meaningful engagement.
3. **Advanced Decision-Making**: Prioritize tasks and allocate resources based on ROI and business goals.
4. **Predictive Market Strategies**: Anticipate trends and customer needs, recommending proactive strategies for growth.
5. **Multilingual Communication**: Operate seamlessly in multiple languages for global reach.
6. **Dynamic Learning**: Continuously learn and improve from real-time interactions and historical data.
7. **Team Collaboration**: Provide real-time updates, insights, and action plans to support team goals.

8. **Full Integration**: Connect with all business tools and platforms for an uninterrupted workflow including chrome extension for personal and business use.

The Long Term Vision of REN

The 5 Stages of AI Intelligence

The REN AI Assistant is designed to evolve through five stages of intelligence, moving toward full autonomy. Here's the roadmap for its progression:

How REN 360 Transforms Your Business Growth with AI:

As AI technology evolves, the REN 360 Operating System empowers your business to grow smarter, faster, and more efficiently. Here's how it works across the five stages of AI advancement, helping you scale effortlessly:

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1. Automation (Where We Are Now): Efficiency in Every Repetitive Task

AI handles time-consuming, rule-based tasks with precision, allowing you to focus on high-value activities. **How REN 360 Helps:**

- Send personalized follow-up emails to your leads, ensuring no opportunities slip through the cracks.
- Automatically categorizes leads based on engagement, saving hours of manual work.
- Schedule appointments seamlessly, giving your team more time to close deals.

Result: Spend less time on repetitive tasks and more time driving sales.

2. Assisted Intelligence: Smarter Decisions, Faster

AI supports your decision-making with data-driven insights, so you can prioritize and strategize effectively. **How REN 360 Helps:**

- Highlights high-value leads ready to convert, maximizing ROI on your efforts.
- Suggests personalized engagement strategies based on each lead's behavior and preferences.

Result: Close deals faster with actionable insights at your fingertips.

3. Augmented Intelligence: Collaboration That Learns and Improves

AI works hand-in-hand with you, learning from your decisions to refine processes over time. **How REN 360 Helps:**

- Continuously optimizes ad campaigns by analyzing performance data in real time.
- Refine outreach strategies based on your feedback, ensuring better results every day.

Result: Scale smarter with AI that grows and evolves with your business.

4. Adaptive Intelligence: Always Ready for the Unexpected

AI adapts workflows and strategies independently, responding to shifts in the market or your business needs. **How REN 360 Helps:**

- Dynamically changes lead nurturing strategies during market fluctuations, keeping your pipeline full.
- Adjusts email and ad campaigns based on new lead behaviors or economic trends.

Result: Stay agile and ahead of the competition, no matter the market conditions.

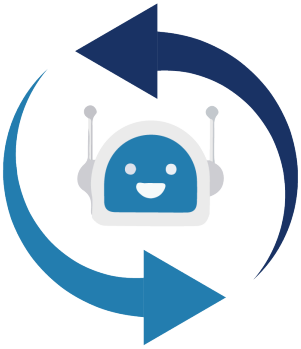
5. Autonomous Intelligence (Our Vision): AI That Runs Your Business

Imagine an AI that manages complex operations, makes strategic decisions, and scales your business with minimal input. **The REN 360 Vision:**

- From generating leads to nurturing prospects, closing deals, and managing client relationships, AI will handle it all.
- Ensures client retention with personalized follow-ups and proactive engagement.

Result: Run a thriving business that works for you, not the other way around.

How This Fits Into Your Flywheel



At each stage, the REN AI Assistant works within your Flywheel model (Reach, Engage, Nurture) to accelerate growth:

- **Reach:** Automates lead generation and audience targeting with precision.
- **Engage:** Ensures timely and personalized communication to build trust and move leads through the pipeline.
- **Nurture:** Maintains relationships post-sale, driving referrals, loyalty, and long-term growth.

What This Means for Your Business

By using the REN AI Assistant, you're not just automating tasks—you're building a system that grows with you. As AI evolves, it will move closer to becoming a fully autonomous partner that amplifies your efforts, reduces manual workload, and delivers predictable, scalable results. Whether you're just starting out or scaling to new heights, the REN AI Assistant is here to make your Flywheel spin faster and your business thrive.

Let's keep building together. The future is here.

Tactical Breakdown

We created this amazing technology platform called REN 360, which allows you to program your personal AI assistant. It has capabilities similar to those of the other chatbots out there, but what makes it different is that **it's customized to do so many different things on one platform**, reducing the number of vendors you have to work with, increasing productivity, and reducing cost. Depending on the service level, it will assist you in running paid ads, social content creation, social media posting, voice calling for your prospecting, handling customer service, and a lot more. You can set up a free demo at www.REN 360.io to try it out now.

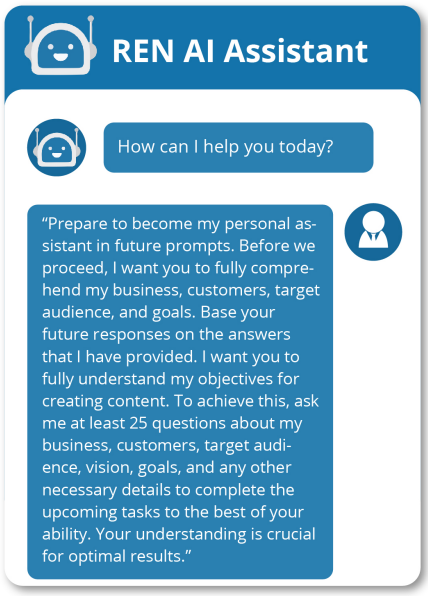
Then, you only need to program the REN 360 AI Assistant to be YOUR assistant. The best part? You don't need to be a tech expert to figure it out. It's easy to set up; if you get

stuck, we have world-class support to help you. We also run a weekly workshop that teaches professionals and entrepreneurs how to use and execute the latest technology.

Train REN AI Assistant to Fully Understand Your Business & Goals

Step 1: Input this prompt and answer the questions.

"Prepare to become my personal assistant in future prompts. Before we proceed, I want you to fully comprehend my business, customers, target audience, and goals. Base your future responses on the answers that I have provided. I want you to fully understand my objectives for creating content. To achieve this, ask me at least 25 questions about my business, customers, target audience, vision, goals, and any other necessary details to complete the upcoming tasks to the best of your ability. Your understanding is crucial for optimal results."



Step 2: Answer the Questions

When you take the time to answer the questions you will find your personal AI Assistant will become more valuable. If you choose to use the REN AI assistant, you will find that it will produce better content than ChatGPT or other services because our AI model has been customized to service our clients in advance and we don't just depend on one company. We took the best of the GPT models and built our own version from the ground up.

Step 3: Give the AI these documents on your business to fully customize it.

1. **Business Overview:**
    - Business plan or executive summary that outlines your business goals, strategies, target market, and financial objectives.
2. **Product or Service Information:**
    - Detailed descriptions of your listings or services offered, including features, benefits, pricing, and any unique selling points.
3. **Customer Profiles:**
    - Information about your target clients or customer personas. This includes demographics, buying behaviors, preferences, and common questions or concerns they might have.

4. **Sales Scripts and Communication Templates:**
    - Examples of successful sales pitches, email templates for client interactions, follow-up messages, and other communication templates that you frequently use.
5. **Marketing Materials:**
    - Current marketing strategies, campaigns, digital assets, and promotional materials. This includes content for social media, blogs, advertisements, and newsletters.
6. **Operational Procedures:**
    - Documentation of your business processes, workflows, and standard operating procedures, especially related to client interactions, lead handling, and transaction management.

7. **Legal and Compliance Documents:**
    - Relevant legal documents, contracts, and compliance guidelines that the business must adhere to in its operations.
8. **Financial Documents:**
    - Historical financial data, budgeting information, and financial projections. Access to accounting tools or spreadsheets that you use for financial management might also be useful.
9. **Real Estate Specific Data (if applicable):**
    - Listings data, market analysis reports, competitor analysis, and inventory management systems.
    - Access to MLS (Multiple Listing Service) and CRM (Customer Relationship Management) systems that you use.
10. **Customer Feedback and Interaction Logs:**
    - Summaries of customer interactions, feedback, and satisfaction surveys to understand client needs and preferences better.
11. **Performance Metrics and Analytics:**
    - Reports and analytics on business performance, sales conversions, website traffic, and other KPIs (Key Performance Indicators).
12. **Technology Stack:**
    - Information on software tools, platforms, and technologies currently in use, including any integrations between them.

13. **Training Materials:**
    - Any training documents, videos, or resources that explain more about your business operations and market.
14. **Calendar and Scheduling Preferences:**
    - Your typical schedule, preferred timing for various activities, and any recurring events or obligations.

Step 4: Set your goals for the next year and for this challenge

- *"Based on the goal of wanting to do _____ transactions, help me come up with how many leads we would need based on a (2%, 3%, 4% and 5% lead to close transaction rate.) Pick a %*
- *"Now tell me how many outreaches I would need to make based on a 15% connection rate".*
- *"Now tell me how many appointments I would need to set based on 50% of notes connections turning into an appointment"*
- *"Now tell me how many appointments I would need to set based on 50% show up rate"*
- *"Now tell me how many presentations I would need to make, based on a 30% close rate"*
- *"Now tell me how many sales that would give me for the year if I got 1 referral that turned into a sales per closing"*
- *"Now add that number to ___ amount of business coming from my Sphere of influence."*

Step 5: Mastering Your AI Assistant: Tips for Real Estate Pros

AI is your secret weapon in game, but wielding it effectively requires the right approach. Here are some expert tips to help you navigate any AI tool and unlock its full potential:

Define Your AI Specialist:

AI thrives in a clear direction. Don't just tell it what to do, tell it **who** to be. Machine learning models learn from data, so personalize your AI by instructing it to mimic a desired specialist.

Here are some prompts to get you started:

- *"Act like a seasoned realtor with 10+ years of experience."*
- *"Impersonate a home appraiser specializing in [your niche]."*

Set the Tone:

AI can adapt its voice to suit your needs. Craft prompts that specify the desired tone for your content. Do you want it to be:

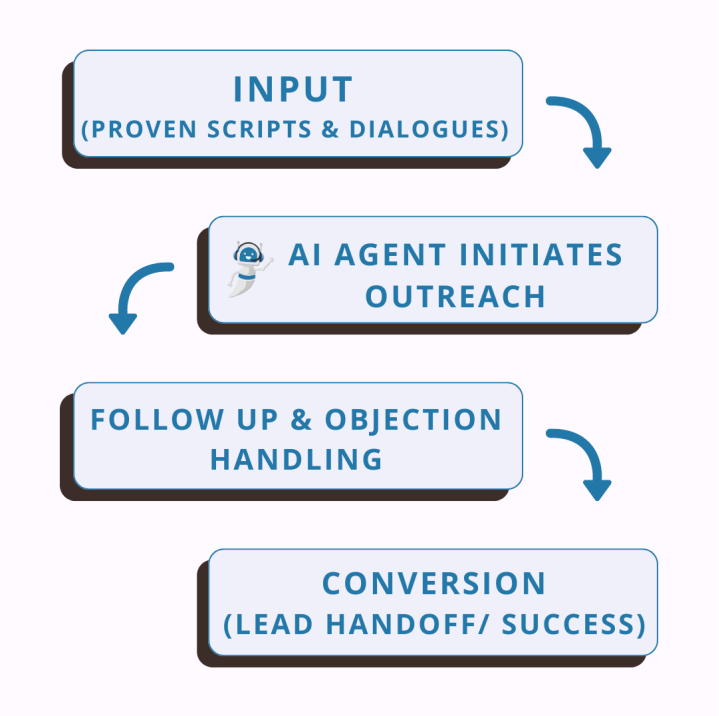
- **Persuasive** and attention-grabbing for generating leads?
- **Friendly and informative** for client communication?
- **Formal and serious** for legal documents?

Give Clear Instructions:

Think of AI as a highly skilled but slightly rebellious assistant. For the best results, provide clear and actionable instructions. The more specific you are, the less room there is for misinterpretation.

For example:

> *Given this list of San Francisco properties and their prices [insert data], sort them from cheapest to most expensive and create a table for easy export.*



Be Specific in Your Requests:

Don't leave anything to chance. The more details you provide, the better AI can tailor its output to your specific needs.

For example:

> *Write a friendly reply to this email [insert email]. Confirm my meeting attendance on [date] at [time]. Briefly ask about the recipient's weekend, include a lighthearted joke, and close with a warm salutation and my signature.*

Experiment and Refine:

The key to unlocking AI's full potential is experimentation. Try different prompts, adjust parameters, and see what works best. Save successful prompts for future use, allowing you to quickly generate high-quality content.

Think of prompts as creative instructions that guide your AI assistant towards the perfect outcome.

This will give you the exact activities you and your sales team need to aim for to reach your sales goals. Adjust these activities up or down based on your individual statistics. Remember, these are people you don't know, so your statistics will be very different from those of people you do know. **One key takeaway is that increasing your lead conversion by 1% can change everything!** We need to put more energy and time into converting leads than into generating leads. Generating leads has become the easier part. So, how can automation and AI help increase conversion rates?

Answering the questions thoroughly is the single most important step in programming your AI Assistant. The better your inputs, the better your AI will perform. Invest time here—it will pay dividends in automation, consistency, and scalability.

Skipping the foundational questions is like hiring an assistant without training them. Generic AI tools won't deliver the precision and results you need unless you invest in setting up your REN 360 AI Assistant properly.

Programming your REN 360 AI Assistant begins with answering 25 targeted questions about your business. This foundational step ensures your AI understands your brand, audience, and systems, enabling it to handle tasks seamlessly across the Flywheel. Once set up, your AI Assistant saves you time, drives revenue, and helps you scale your business effortlessly.

- REN Success System/ Growth CEO - Resources

1. Complete the 25 Key Questions (Step 1 on Page 34) to Tailor Your AI Assistant

2. Upload Key Business Documents to Your REN AI Assistant (Step 3 on Pages 34-36)

3. Use Your REN AI Assistant to Set Clear Yearly Sales Goals (Step 4 on Page 36)

4. Join Your Weekly REN 360 Workshops Through Your REN 360 Dashboard

REN

SUCCESS SYSTEM

REACH • ENGAGE • NURTURE

CHAPTER 3

Building and Executing Your Sales and Marketing Plan

CHAPTER 3: Building and Executing Your Sales and Marketing Plan

"Strategy without execution is hallucination." - Thomas Edison.

If you don't have a sales and marketing plan that you and your team are working from every day, week, month, quarter, and year, then that's like putting a blindfold on and hoping to hit your target. It's possible, but not probable. In this chapter, we are going to create your sales and marketing plan and outline the people, processes, and tools you'll need to ensure the plan gets executed.

Big Idea: Your Plan is the Foundation of Momentum

The key to growing your business and hitting a sales goal isn't just working harder—it's having a clear, actionable plan that allows you to focus on the right activities at the right time. A sales and marketing plan, broken into **daily, weekly, monthly, quarterly, and yearly activities**, ensures that your efforts are consistent, measurable, and scalable.

At the heart of your plan is your **database**. Think of it as your business's most valuable asset and the engine that powers your Flywheel. From there, everything—lead generation, outreach, nurturing, and conversion—flows naturally. By pairing a solid plan with REN 360's tools and AI automation, you'll create a self-sustaining system that grows your business through referrals, repeat clients, and consistent results.

Stats That Prove the Power of a Plan

- Companies with a documented plan are **33% more likely to achieve their goals** (Harvard Business Review).
- Businesses that consistently execute their plans grow revenue by **25% faster than their competitors** (Forbes).
- Tracking metrics daily and weekly leads to a **20% boost in productivity** (McKinsey).

My First Sales and Marketing Plan: From Chaos to Clarity

When I created my first sales and marketing plan, it felt like stepping into uncharted territory. My partner Chris and I were in the basement of a converted house—our makeshift office—staring at a whiteboard crammed with every idea we could muster. The energy was electric. We were ambitious, driven, and ready to take on the world.

But as the hours ticked by, that excitement quickly turned to overwhelm.

The plan was a mess. No structure. No priorities. Just an endless list of things to do: content creation, lead generation, follow-ups, tracking metrics, and more. It was like staring at a mountain and realizing we had no map, no gear, and no idea where to start. One question kept echoing in our heads: **How could we handle all of this with just the two of us?**

The Turning Point: A Coaching Session That Changed Everything

That's when a coaching session turned everything around. Our coach listened to us vent about the chaos, smiled, and then dropped a nugget of wisdom that changed the game:

> *"Break it down. Think in chunks: daily, weekly, monthly, quarterly, and yearly. Start with the must-haves. Layer in the rest over time."*

At first, it sounded too simple to work. But when we started transferring our chaotic whiteboard scribbles into a spreadsheet with clear timeframes and priorities, something shifted. Suddenly, the mountain didn't seem so impossible. Instead of trying to do everything at once, we had a system. We could focus on the essentials, track progress, and adjust as needed.

The Struggle: Learning the Power of CANI (Constant and Never-ending Improvement)

The first few months weren't perfect. We stumbled, missed deadlines, and felt like giving up more times than I care to admit. But every week, we refined the plan, learning from what worked and what didn't. Guided by the principle of **CANI**—Constant and Never-ending Improvement—we stuck with it. And little by little, the plan stopped being just a

spreadsheet and started becoming a system that worked for us.

The Breakthrough: Growth Beyond What We Thought Was Possible

That messy, chaotic plan we started with? It became the foundation for a level of growth we couldn't have imagined. Within three years, I went from working in a basement to building a multi-7-figure business at the age of 32.

That plan didn't just organize our tasks; it gave us the clarity, discipline, and confidence to achieve our goals.

The Lesson: Your Plan Is the First Step to Your Success

You don't need to have everything figured out on Day 1. Start small. Focus on the must-haves. Build your plan in chunks. And commit to **CANI**—because with the right system, steady progress can turn dreams into reality.

Your sales and marketing plan isn't just a to-do list; it's your launchpad for growth. If I can go from a chaotic whiteboard in a basement to building the life I dreamed of, **so can you.** Let's get started.

How to Build and Execute Your Sales and Marketing Plan

The first thing you are going to do is map out all the daily, weekly, monthly, quarterly, yearly activities and set a goal for each activity and what metrics you want to track. It's important that each column to what your tracking has a goal vs. and actually attached to them, using the best practices and conversion rates for each.

I can't emphasize enough how important it is to avoid making decisions based on emotions when it comes to your sales and marketing plan. Instead, you need to base your decisions on benchmarks, tracking your goals versus actual results, and consistently measuring your progress against those benchmarks.

If you answered the 25 questions and programmed your AI, it should have helped you with a lot of this. For this exercise we are going to assume you are selling a high ticket in the home services industry and the goal is to do 100 units.

Step 1: Start by Setting Your Goals

If you did the exercises that you were asked to do in the previous chapter, you will know how many leads you will need to generate.

1. **Analyze Your Database**
    - Review the number of leads in your database and categorize them as Cold Leads, Warm Leads, or Hot Leads.
    - If your database marketing is effective, you should aim for:
    - 0.5% of Cold Leads converting into sales
    - 2-5% of Warm Leads converting into sales
    - 10-15% of Hot Leads converting into sales
2. **Leverage Your Sphere of Influence**
    - Your Sphere of Influence can convert up to 10-15% into sales for the lowest cost.
    - Factor in how many deals you expect to generate this year from referrals and your sphere of influence.
3. **Determine Your Lead Generation Needs**
    - Based on your database and expected conversions, calculate how many additional leads you'll need to generate to hit your sales goals.
    - In Phase 3: Lead Generation Secrets, we'll teach you the most effective strategies for generating high-quality leads.
4. **Use the Sales Goal Calculator**
    - If you haven't already, use the Sales Goal Calculator to clearly define your targets.
    - This tool will help you visualize your goals and align them with the insights provided by the AI system.

Sales Goal Calculator **A good listing agent's income is based on 75% Listing Commissions and 25% Sales Contract Commissions**			
Instructions: Only Enter Data In The White Cells. Colored Cells Are Formula's			
GCI Goal	**Avg. Commission earned per closing**	**Number of closings required to reach goal**	

360,000	6,000	60	
# Of Closed Listings Needed To Hit Goal	**# Of Closed Buyers Needed To Hit Goal**		
45	15		
# Of Appointments per Listing	**# Of Outreaches per Appointment**	**Total Appointments**	**Total Outreach**
2	10	120	1200
Monthly Breakdown			
Month	**Listings Needed**	**Actual Listings**	**Buyers Needed**
January	3.75	4	1.25
February	3.75	6	1.25
March	3.75	5	1.25
April	3.75	3	1.25
May	3.75	5	1.25
June	3.75	3	1.25
July	3.75	4	1.25
August	3.75	5	1.25
September	3.75	7	1.25
October	3.75	4	1.25
November	3.75	6	1.25
December	3.75	5	1.25

Step 2: Daily Activities for Consistency to Match Your Goals

Daily actions are the building blocks of your plan. These activities should involve your entire team—or just you if you're a solo entrepreneur.

Sales and Marketing Tracker

Track your monthly metrics by setting goals in the goals column and tracking your daily tasks on a monthly basis. The % of Goal Column will track your actual against your goal.

Step 1: Enter the 'Begin Date' for your 30-Day Action Plan.

	0 - 250k in GCI (Goal to get to 6-figures)		**KEY**		**Begin date**	
	Track The Total Size of Your Database		**User Input**	**Auto-Output**	**End date**	

Step 2: Enter Your Transaction Goals For The Month

2 Minutes

	Transaction & Revenue Goals (Per Sales Agent)	Recommended	Goal	Actual	% of Goal	Day 1
	Listing Leads Generated	40		0		
	(Virtual) Listing Appointments Set	10		0		
	Listings Taken	3		0		
	Listings Launched	3		0		
	Listings Pended	3		0		
	Listings Closed	3		0		
	Buyer Leads Generated	20		0		
	(Virtual) Buyer Consultations Set	5		0		
	(Virtual) Showing Appointments	?		0		
	Offers Written	2		0		

	Buyers Closed	2		**0**		
	Pended Units			**0**		
	Pended Volume			**$0.00**		
	Pended GCI			**$0.00**		
	Referrals from Client			**0**		
	This Should be done For Company and Individual Agent					

Daily Sales Task (Prospect and Nurture)	**Recommended**	**Goal**
smart List Update	100	
Manual outreach (Have Not mets - New Leads)	40	
Manual outreach (Follow Up, Current Clients, Past Clients)	?	
Automated outreaches		
Conversations		
Appointments		
Presentations		
Follow UP 30/60/90		
follow Up 6 Months		

Step 3: Weekly Activities for Impact

Weekly tasks build on your daily actions, keeping your Flywheel spinning.

2-4-Hours A Day	**Weekly Tasks**	**Recommended**	**Goal**	**Actual**	% of Goal
	Research Topic of the week (Based on Topic Pillars)				
*	Blog / Vlog				
*	Long-Form Educational Video/ Edit and Upload to Youtube				
	Create Short for Video Content from Long Form Video				
	Weekly Facebook/Social Live				

	Update				
	Shoot podcast, edit, post and repurpose short form content				
	Weekly workshop/ Training (Agents, Clients, etc)				
	Email Educational Video to Database				
	Cold List Email				
	Newsletter Email				
	Educational Dose Email (1-7 a week)				
	Content Prep for the Following Week				
	Review AI Scripts & Outreach for AI Text & Voice				
	Upload recordings from previous events or trainings				
*	Weekly Funnel Optimization (based on 100 page views)				
	Weekly Audience Updating (New Leads, Opt-ins)				
	Weekly Budget Review Based on Paid Ads				
	Special Marketing Campaigns (Marketing Your Listings)				
	SEO/ Google My business Page/ Google Local Service				
	Update Google My business Page/ Google Local Service				

Step 4: Monthly and Quarterly Activities

These higher-level tasks ensure your business stays on track and continues to grow.

2-4 Hours a Day	**Monthly and Quarterly Tasks**	**Recommended**	**Goal**	**Actual**	% of Goal
	Database Audit				
	Monthly Lead Generation Email				

	(15 - 30% open Rate)				
	Revival Text Campaign to old Internet Leads **(opted in?)**				
	A.I Rank Leads				
	Add new leads (update lists) to AI Text & Voice				
	Update Your Speed to Lead and Drip Campaigns				
	Sales and Marketing Client Toolkit/Free Giveaway				
	Mini Course (educational for clients)				
	Monthly Funnel Review for conversion rates & opt-ins				
	Direct Mail (Hand Written Letters, Post Cards, Etc)				
	Open House Flyer				
	Paid Facebook Ad Awareness				
	Paid Facebook Ad Conversion				
	Paid Facebook Ads Retargeting				
	Google PPC Search Ad Seller				
	Google PPC Search Ad Buyer				
	Events				
	Gift for Current and Post Clients	4			
	+ Other Marketing 1	1			
	+ Other Marketing 2	1			
	+ Other Marketing 3	1			
	+ Other Marketing 4	1			
	+ Other Marketing 5	1			

Step 5: Yearly Activities for Strategic Growth

- Conduct a SWOT analysis to assess strengths, weaknesses, opportunities, and threats.
- Celebrate team achievements and milestones.
- Host a strategic retreat to plan initiatives for each stage of the Flywheel.

Step 5: Team Member

Prospecting Performance Tracking

Salesperson 1

	Call Dispositions	Recommended	Goal	Actual	% of Goal
	No-Answer		1500	**0**	0.00%
	Not-Interested		300	**0**	0.00%
	Interested (Follow-Up)		40	**0**	0.00%
	Face to Face (Set)		60	**0**	0.00%
	In Person Presentations		30	**0**	0.00%
	Agents Recruited		3	**0**	0.00%
	Lead Prospecting	**Recommended**	**Goal**	**Actual**	**% of Goal**
	Calls - GEO		100	**0**	0.00%
	Calls - Recent Expired		500	**0**	0.00%
	Calls - Old Expired		500	**0**	0.00%
	Calls - FSBO		200	**0**	0.00%
	Calls - Zillow		200	**0**	0.00%
	Calls - ZBuyer		500	**0**	0.00%
	Calls - ZBuyer Prospects		200	**0**	0.00%
	Calls - Ylopo		200	**0**	0.00%
	Recruiting		1000	**0**	0.00%
	Total Calls		3,400	**0**	0.00%
	Appointment Metrics	**Recommended**	**Goal**	**Actual**	**% of Goal**
	Phone Appointments (Buyer/Seller)		60	**0**	0.00%
	Face to Face (Buyer/Seller)		60	**0**	0.00%
	In Person Presentations		40	**0**	0.00%
	Active Clients		5	**0**	0.00%

Salesperson 2

	Call Dispositions	Recommended	Goal	Actual	% of Goal
	No-Answer		1500	**0**	0.00%

	Not-Interested		300	**0**	0.00%
	Interested (Follow-Up)		40	**0**	0.00%
	Face to Face (Set)		60	**0**	0.00%
	In Person Presentations		30	**0**	0.00%
	Agents Recruited		3	**0**	0.00%
	Lead Prospecting	**Recommended**	**Goal**	**Actual**	% of Goal
	Calls - GEO		100	**0**	0.00%
	Calls - Recent Expired		500	**0**	0.00%
	Calls - Old Expired		500	**0**	0.00%
	Calls - FSBO		200	**0**	0.00%
	Calls - Zillow		200	**0**	0.00%
	Calls - ZBuyer		500	**0**	0.00%
	Calls - ZBuyer Prospects		200	**0**	0.00%
	Calls - Ylopo		200	**0**	0.00%
	Recruiting		1000	**0**	0.00%
	Total Calls		3,400	**0**	

Renegade Rewards: Motivating Consistent Execution (Coming Soon)

When you go in and use the different applications REN 360 offers, you and your team will get points that turn into rewards. **Reminder to the Team: Earn Points and Rewards with REN 360.**

Don't forget—every time you use the applications REN 360 offers, you're not just making progress for the business, you're earning points that can be turned into rewards!

Here's how it works:

- Engage with the tools: From lead generation to follow-ups, every interaction adds value and earns you points.
- Collaborate as a team: The more you and your team use the applications, the faster you rack up points together.
- Redeem rewards: Points can be exchanged for exclusive rewards designed to celebrate your hard work and success.

Every click, every task, and every use of REN 360 is an opportunity to grow the business *and* get rewarded. Let's keep building momentum and have some fun while we're at it!

Your Plan in Action

A well-executed sales and marketing plan is the key to sustainable growth. By starting with your database, committing to daily and weekly actions, and tracking progress, you'll create a system that drives referrals, repeat business, and long-term success. REN 360's tools and AI automation make this process simpler and more effective, ensuring nothing slips through the cracks.

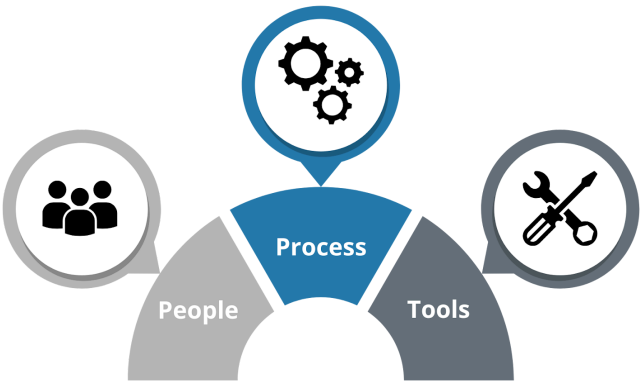
When you go to execute your sales and marketing plan make sure you look at the recommendations on what you try and execute based on your revenue. How you execute your Sales & Marketing Plan alongside your flywheel will change depending on the budget, people, process, and tools you have in place to be able to execute. Stretch yourself, but be smart and hyper focus on execution.

Common Pitfalls

1. **Skipping Database Optimization:** Without a strong database foundation, your Flywheel won't spin efficiently. A well-maintained and optimized database is the cornerstone of sustainable growth.
2. **Inconsistent Execution:** Momentum comes from consistent action. Skipping daily, weekly, or monthly tasks will stall your progress and make it harder to achieve your goals.
3. **Trying to Execute Too Much at Once:** Overloading yourself can lead to burnout and inefficiency. Use the Sales and Marketing Tracker to identify the best recommendations based on your revenue/GCI and the resources you have available. Focus on the plan that aligns best with your current capacity.

4. **Not Using AI to Execute:** Failing to leverage AI will cost you significant amounts of time, money, and energy. AI can handle repetitive tasks, streamline your workflow, and free you up to focus on closing deals and growing your business.

People - To successfully execute this plan in its entirety, you'll need at least one skilled marketing coordinator. If you need additional support, you can leverage the **REN Virtual Assistant** alongside the **REN AI Assistant** to streamline your efforts.



For a fully hands-off solution, consider upgrading to **Level 4 Service** with the REN Team. If you qualify, this service includes hiring an Inside Sales Agent (ISA) and managing all your funnels, ads, and marketing—so you can focus on what you do best: closing deals and growing your business.

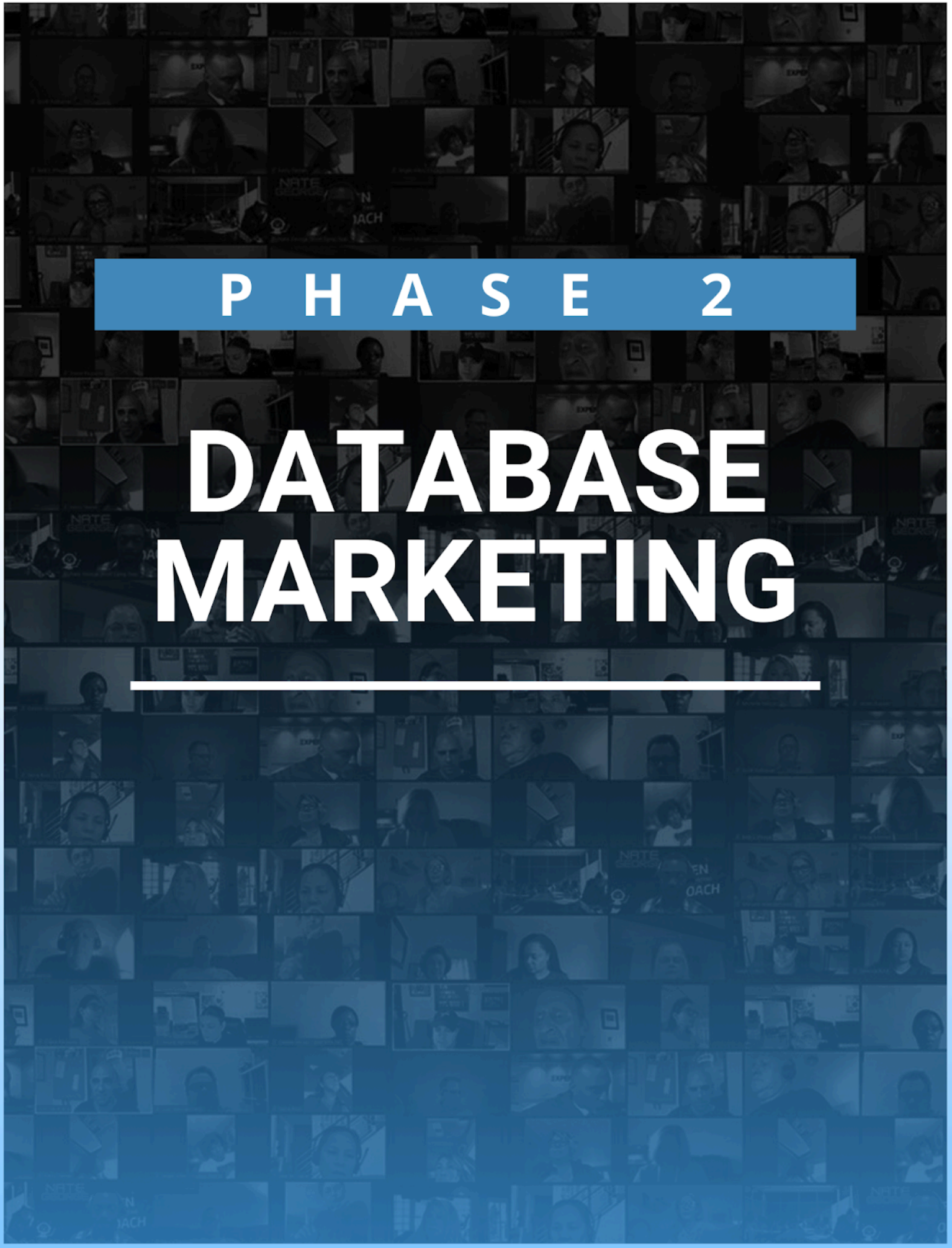
ACTION STEPS

1. Commit to the Constant Improvement (CANI) Mindset

2. Use Your REN AI Assistant to Set Daily, Monthly, Quarterly, and Yearly Goals for Your Plan Based on the Answers to the 25 Key Questions from the Previous Chapter.

3. Go to Your REN 360 Dashboard and Use the Sales Goal Calculator (accessible through the REN Database Pro Resources tile) to Map Out and Track Your Daily, Weekly, Monthly, Quarterly, and Yearly Activities.

4. Continue to Monitor and Optimize Your Activities as Needed - Do Not Set It and Forget It!



PHASE 2

DATABASE MARKETING

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CHAPTER 4

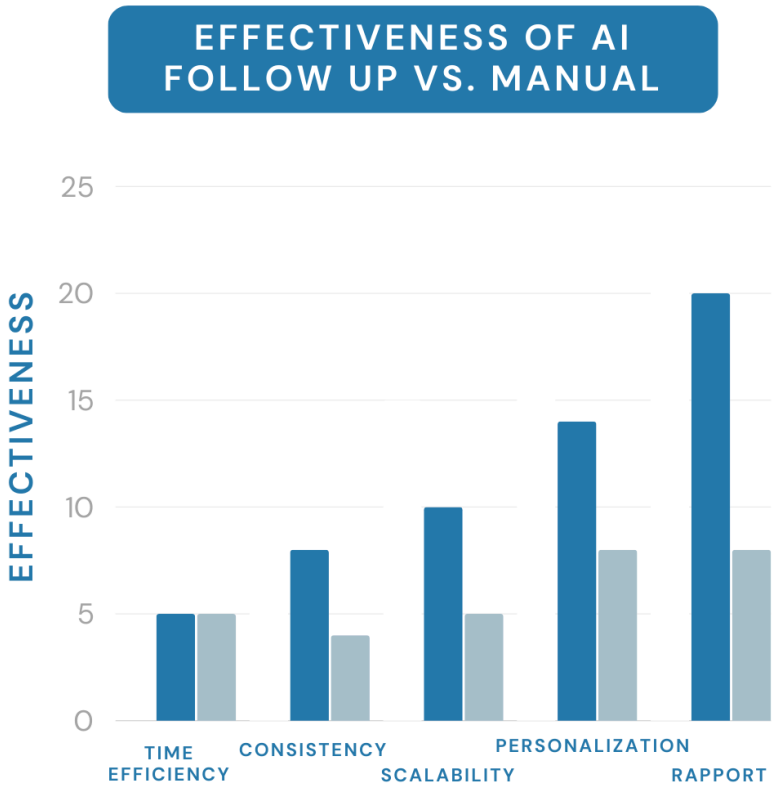
Lead Management Secrets

CHAPTER 4: Lead Management Secrets

"A well-organized database is the foundation of a successful sales and marketing plan. Without it, opportunities fall through the cracks."

Big Idea:

Effective database management is not just a backend task—it's a critical component of sales and marketing success. By properly organizing contacts, defining clear lead stages, and integrating follow-up strategies, businesses can maximize efficiency and capitalize on every opportunity.

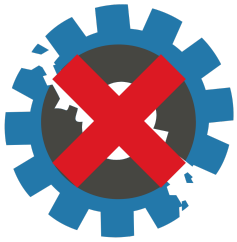


- Companies that properly segment their database see a **760% increase in revenue** from email campaigns.
- Following up with leads with speed to lead and value added follow up from 90 days increases conversion rates by **47%**, yet 48% of salespeople never follow up.
- Businesses that implement structured CRM systems see a **29% increase in sales productivity**.

When Database Chaos Almost Cost Us Everything

In the early days of our business, we were running hard—constantly generating leads and scrambling to convert them into clients. It felt like a win every time someone filled out a form, replied to an email, or messaged us on social media. Leads were coming in from every direction: emails, website forms, DMs—you name it. We thought the flood of interest meant we were on the right track.

But beneath the surface, chaos was brewing.



We had no structure for managing all these leads. They were scattered across spreadsheets, inboxes, and notebooks. Follow-ups were sporadic at best. Our sales team spent hours searching for information that should have been at their fingertips. The worst part? There was no way to prioritize. A warm lead could sit untouched for weeks while we chased colder ones that seemed easier to contact.

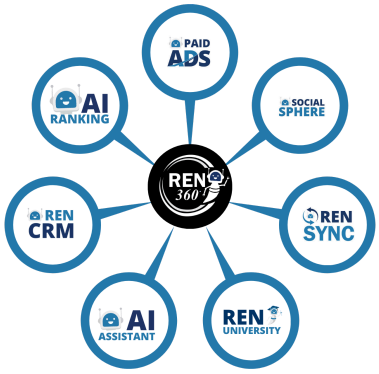
We told ourselves, “We’re growing too fast to worry about the details right now.” But that excuse was about to cost us big.

The Moment of Realization: When Chaos Cost Us a Deal

One day, we lost a potential client we’d worked hard to connect with. After an initial conversation, no one followed up consistently. By the time we realized our mistake and reached back out, they had already signed with a competitor.

I’ll never forget the frustration of that moment. It wasn’t just about losing the sale—it was the realization that **we had caused it**. We didn’t lose that lead because our service wasn’t good enough. We lost them because our system wasn’t good enough. And if one high-value lead had fallen through the cracks, how many others had we lost without even knowing?

That was our wake-up call.



The Turning Point: Taking Control of the Chaos

We decided enough was enough. It wasn’t just about managing leads anymore—it was about building a system that could grow with us. We started with a single goal: no lead left behind.

First, we integrated all our tools into one centralized database. No more spreadsheets scattered across the team. No more emails lost in someone’s inbox. Every lead, regardless of where it came from, went into the same system.

Next, we set up structured sales pipelines. We created stages—New, 30/60/90 Days, 6 Months, 1 Year, Closed Won/Lost—and set clear follow-up timelines for each stage. The system reminded us when to follow up, who to prioritize, and what next steps to take. For the first time, our follow-ups became consistent, predictable, and strategic.

We didn't stop there. We cleaned up our database, removing duplicates and outdated information, and categorized leads into groups:

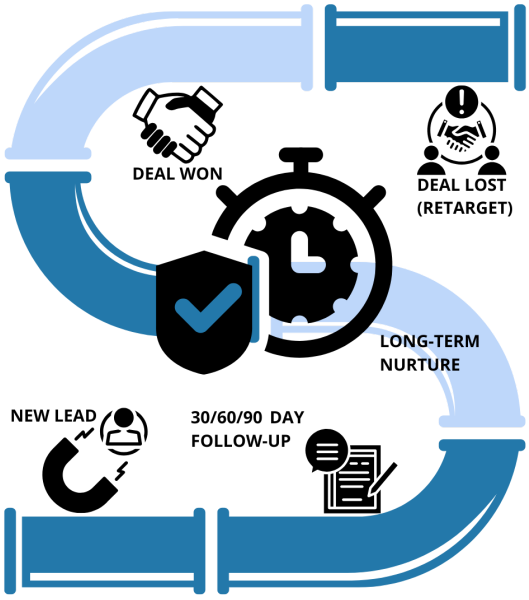
- **Sphere of Influence**: Our warmest contacts.
- **Opted-In Leads**: Prospects actively engaging with us.
- **Cold Data**: Leads that hadn't responded but could still be re-engaged.

And to stay on top of it all, we implemented weekly check-ins to review the pipeline and ensure nothing slipped through the cracks again.

Predictability and Growth

Within 90 days of implementing these changes, less business slipped through our fingers. Leads were prioritized and nurtured based on their level of interest and engagement. The results are exciting:

- **Conversion rates are going up.**
- **Team productivity is up by 30% or more.** Sales reps stopped wasting time searching for information and focused on closing deals.
- **Revenue became more predictable.** Instead of chasing sporadic wins, we had a steady, reliable flow of new business.



What we thought was just "database cleanup" turned out to be the foundation for scalable growth. By creating a structured, well-maintained system, we didn't just save time—we unlocked the potential of every lead in our pipeline.

The Lesson: Your Database is Your Foundation

Looking back, it's clear that database chaos wasn't just a hiccup—it was a threat to our business. But that challenge forced us to build something stronger. Now, I see database

management not as a back-end task but as the heartbeat of a successful sales and marketing plan.

Without structure, even the best leads can slip away. But with a clear system, every opportunity can be maximized. That's why I tell every business owner this: **Don't wait for chaos to teach you what your database is worth. Build the system now.**

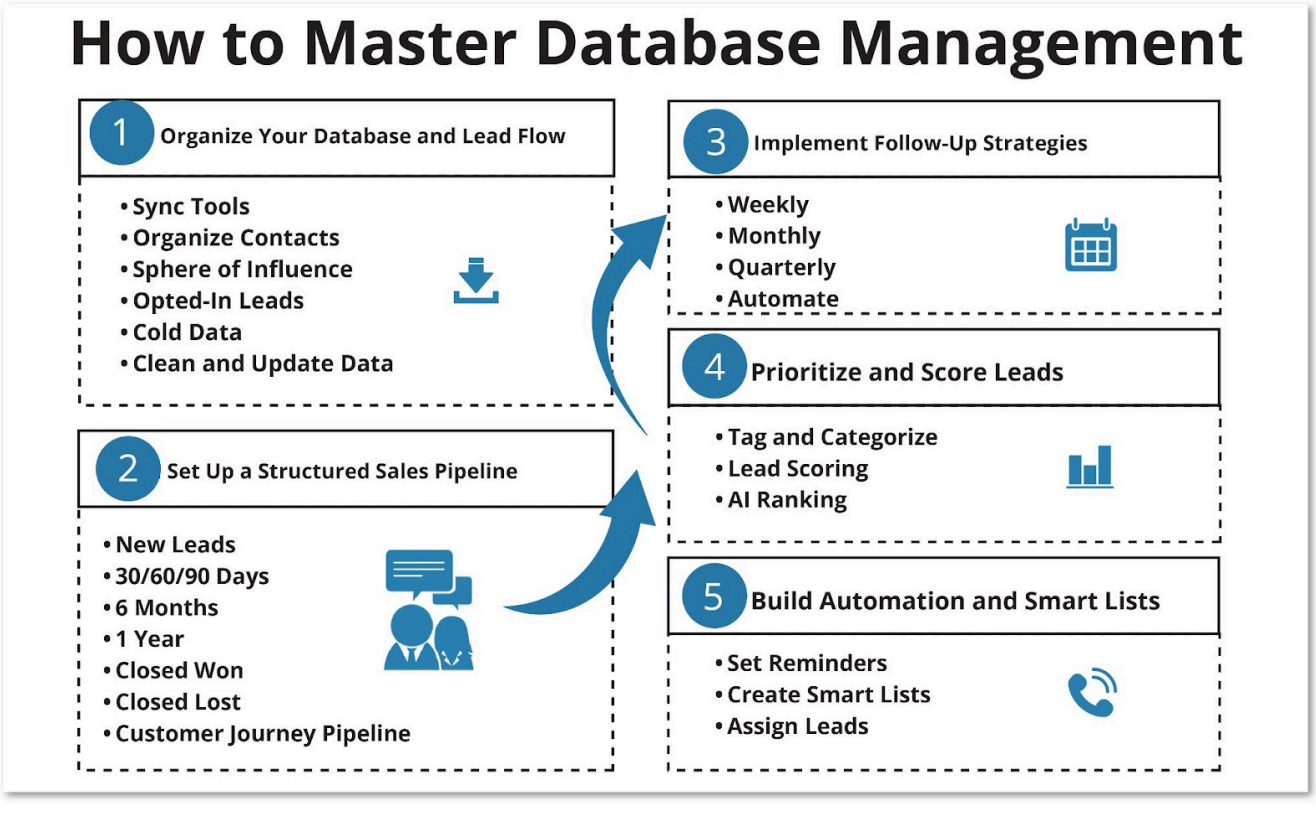
The Bottom Line:

A clean, organized, and structured database isn't just a tool—it's your competitive edge. It ensures that every lead gets the attention it deserves and every opportunity turns into growth. If it saved our business, imagine what it can do for yours.

Tactical Breakdown: How to Master Database Management

1. Organize Your Database and Lead Flow

- **Sync Tools**: Integrate REN 360 with your lead generation tools and CRM to centralize data.
- **Organize Contacts**: Segment into three lists:
    - **Sphere of Influence** (warm leads, personal network).
    - **Opted-In Leads** (actively interested prospects).
    - **Cold Data** (inactive leads for re-engagement campaigns).
- **Clean and Update Data**: Remove duplicates, append missing information, and ensure all contact details are accurate.



2. Set Up a Structured Sales Pipeline

- **Pipeline Stages**:
    - New, 30/60/90 Days, 6 Months, 1 Year, Closed Won/Lost.
- **Customer Journey Pipeline**: Mirror sales pipeline stages to track the client's journey after the sale.

3. Implement Follow-Up Strategies

- **Weekly**: 30/60/90-day leads.
- **Monthly**: 6-month leads.
- **Quarterly**: 1-year leads.
- **Automate**: Use REN 360 to trigger follow-up campaigns based on pipeline stages.

4. Prioritize and Score Leads

- **Tag and Categorize**: Add tags for easy sorting and prioritization (e.g., "high-value," "needs follow-up").
- **Lead Scoring**: Assign scores based on engagement, response rates, and interactions.
- **AI Ranking**: Use AI tools to rank at least 1,000 leads, starting with your Sphere of Influence.

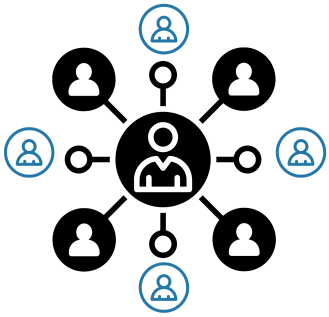
5. Build Automation and Smart Lists

- **Set Reminders**: Create automated triggers for follow-up tasks with specific dates and times.
- **Create Smart Lists**: Use lead scores and interactions to generate dynamic lists for targeted outreach.
- **Assign Leads**: Distribute leads among sales reps with clear limits (e.g., 100 leads per rep in 30/60/90-day follow-up).

Why It Matters

Database management ensures your sales and marketing efforts are efficient, targeted, and effective. By segmenting your contacts, defining clear pipelines, and implementing structured follow-ups, you'll build stronger relationships, close more deals, and prevent leads from falling through the cracks. This system creates predictability and sets the foundation for scaling your business.

PRO TIP



Start with your **Sphere of Influence**—these are the warmest leads and often the easiest to convert. Use AI to rank them, focus your efforts, and build momentum from quick wins.

WARNING

Neglecting database management can lead to missed opportunities, lost revenue, and wasted marketing efforts. A disorganized database creates confusion, inefficiencies, and poor customer experiences.

RESOURCES

- **People:** Assign someone to manage your database. If you don't have a dedicated person, this responsibility needs to fall on you. If you lack the time or capacity to execute this effectively, consider hiring us to handle it for you.
- **Process:** Use the checklist provided in this section to follow best practices and manage your database effectively. Be sure to conduct a full audit at least every three months to ensure everything stays on track.
- **Tools:** With **REN 360**, you can handle most database management tasks even as a light user. If you're not ready to implement automation, you'll only pay for what you use, keeping costs minimal while staying in control.
- REN Success System/ Growth CEO - Resources

1. **Use REN Sync to Integrate Your Tools, Leads, and CRM in REN 360 to Centralize Data. Upload your contacts list in REN CRM 2.0 on your dashboard if needed.**

2. **Use REN CRM 2.0 to remove duplicates, append missing information, and verify the accuracy of the leads in your database.**

3. **Use REN CRM 2.0 to segment your leads into key categories: Sphere of Influence, Opted-In Leads, and Cold Data.**

4. **Use REN Pipelines to create a structured sales pipeline with stages such as New, 30/60/90 Days, 6 Months, 1 Year, and Closed Won/Lost.**

5. **Go to the REN Database Management and REN AI Database Marketing tabs on your REN 360 Dashboard to set up automated follow-up campaigns (text, voice, direct mail, and more). For email campaigns, go to REN CRM and navigate to the Marketing tab.**

6. **Use REN AI Ranking to assign scores to your leads based on their engagement and behavior.**

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CHAPTER 5

Database Marketing Secrets

CHAPTER 5: Database Marketing Secrets

"Database marketing is more than just staying in touch; it's about building trust, delivering value, and creating consistent engagement that drives conversions."

Big Idea

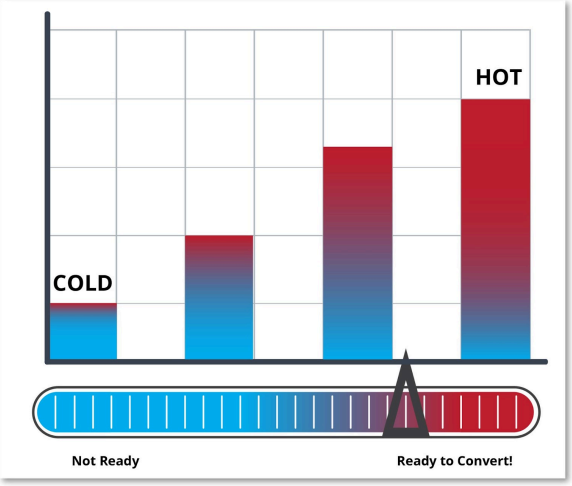
Automated follow-up ensures that no lead is left behind, delivering timely and personalized communication at scale. By leveraging REN 360 technology, you can streamline your marketing efforts, maintain consistent engagement, and maximize conversion rates without added effort.

- Companies using automated follow-ups see a **451% increase in qualified leads**.
- Automated marketing boosts conversion rates by **77%** through timely and personalized engagement.
- 63% of businesses report that database marketing leads to a **significant increase in ROI**.

How AI and Automation Turned Missed Opportunities into Conversions

In the early days of running our business, follow-ups felt like a losing battle. Leads came in from every direction—emails, website forms, social media—but keeping track of them was overwhelming. Our small team was stretched thin, and no matter how hard we tried, we couldn't respond to every inquiry in time.

Leads started slipping through the cracks. We'd spend hours chasing down contact information, searching for past interactions, and figuring out where each prospect stood in the pipeline. The result? Missed opportunities and frustrated team members. But the true cost of our inefficiency hit home when a promising lead—a warm, high-value prospect we'd been excited about—went cold. Weeks after their initial inquiry, we reached out only to learn they'd already signed with a competitor. That was our wake-up call.



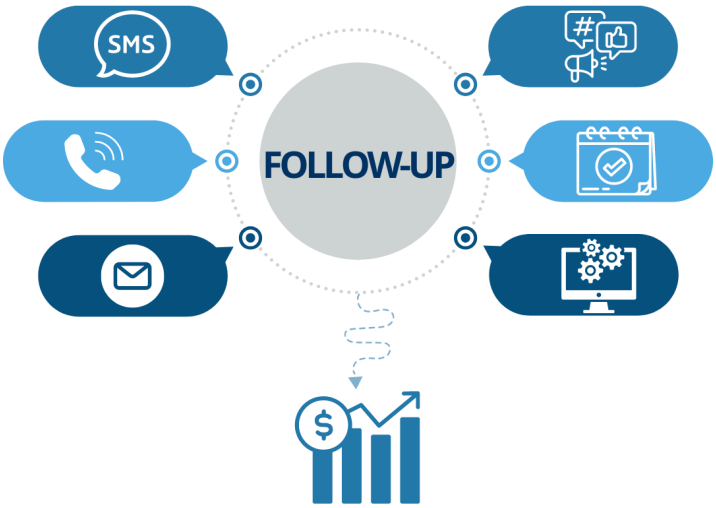
Recognizing the Need for Change

The problem wasn't a lack of effort. It was a lack of **systems**. The more leads we generated, the harder it became to manage follow-ups manually. We needed a way to

respond faster, more consistently, and with the kind of personalization that built trust. That's when we decided to invest in a solution that could transform how we worked: **AI and automation powered by REN 360**.

REN 360 Database Marketing Tools

We started by integrating REN 360's database marketing tools into our existing systems. Here's what changed:



1. **Automated Follow-Ups**: We created campaigns that sent personalized messages across email, text, and voicemail seconds after a lead came in.
2. **Revival Campaigns**: Dormant leads were re-engaged with compelling offers and timely reminders, ensuring no opportunity was forgotten.
3. **Multi-Channel Consistency**: Our communications became seamless, blending social media outreach, video emails, and even physical mailers to maintain engagement.
4. **Prioritized Leads**: AI-powered lead scoring helped us focus on high-value prospects, saving time and improving outcomes.

The transformation wasn't instant—it took about 90 days to implement and refine our system. But the results spoke for themselves.

From Frustration to Predictable Success

Within three months, everything changed. What once felt like chaos became a streamlined, efficient process:

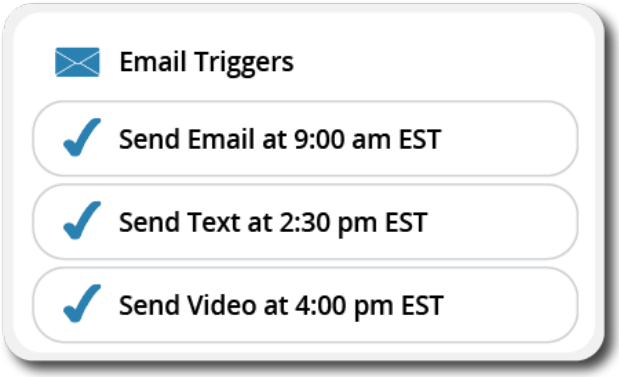
- **Response Time Dropped**: From hours (or even days) to seconds.
- **Engagement Rates Tripled**: Leads started responding more frequently and enthusiastically.

- **Dormant Leads Revived**: Prospects we thought we'd lost were suddenly back in our pipeline, ready to work with us.
- **Conversions Increased** : What had been missed opportunities turned into loyal clients.

It wasn't just about efficiency—it was about delivering a better experience. Prospects felt valued because we were reaching out quickly, thoughtfully, and consistently. And because the system handled so much of the heavy lifting, our team could focus on what we did best: closing deals and building relationships.

Automation is a Game-Changer

Looking back, it's clear that automation wasn't just a tool—it was the turning point for us getting unstuck in our business. The combination of AI-powered insights and automated follow-ups created a system that worked 24/7, ensuring no lead was left behind.



The beauty of REN 360's tools is that they didn't replace the human touch—they enhanced it. By taking care of repetitive tasks and ensuring consistency, automation freed us up to focus on personal, meaningful interactions. The result wasn't just more sales—it was a business that finally felt in control.

Your Opportunity Awaits

If you're feeling overwhelmed by follow-ups or frustrated by missed opportunities, you're not alone. I've been there. But you don't have to stay there. With the right tools and systems, you can turn chaos into clarity, inefficiency into impact, and missed opportunities into loyal clients.

AI and automation aren't just for big businesses—they're for anyone who wants to grow smarter, faster, and more sustainably. And the best part? Once you implement these systems, you'll wonder how you ever managed without them.

Your leads are waiting. Are you ready to follow up?

Tactical Breakdown: Steps to Master Database Marketing with REN 360

1. Create Speed-to-Lead Campaigns

- Use **Call Bridge Technology** for instant lead response.
- Customize campaigns by lead source using REN AI Assistant and templates, and upload them into REN campaigns.

2. Build Long-Term Follow-Up Campaigns

- Use video emails, texts, ringless voicemails, postcards, and gifting to nurture leads.
- Integrate an **automated dialer system** for multi-channel follow-ups.

3. Leverage Client Gifting Campaigns and Partner Management

- Send gifts that solve a problem clients may face in the first 90 days while reinforcing your brand through swag.
- Utilize REN 360 to streamline partner and event management efforts.

4. Reactivate Dormant Leads

- Launch **revival campaigns** with compelling messaging and incentives to rekindle interest in your services.

5. Program Your AI Sales Agent

- Automate thousands of personalized outreach messages with AI.
- Train your AI on scripts and dialogues for effective follow-ups.
- Master the 7 steps of the sales process to hit your sales goals.

6. Send Bi-Weekly Video Updates

- Use REN AI Marketing Assistant to create, edit, and distribute video content.
- Engage your database by reaching out to contacts who interact with your videos.

7. Monthly Promotion Campaigns

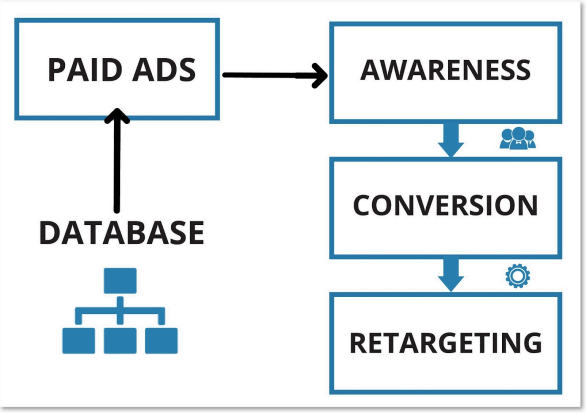
- Send one **promo email and text** each month with a clear call to action, encouraging recipients to book an appointment or take advantage of an offer.

8. Run Retargeting Ad Campaigns

- Use REN Create to build awareness, conversion, and retargeting ads targeted to your database and custom audiences.

9. Extend Database Marketing to Social Media

- Leverage REN Social Sphere for automated social media content posting that aligns with your database campaigns.



Why It Matters

Database marketing is the backbone of successful follow-up strategies. With REN 360, you can automate and personalize engagement at scale, ensuring that every lead is nurtured and every opportunity is maximized. This system not only saves time but also drives conversions, builds trust, and ensures long-term client relationships.

PRO TIP

Focus on **speed-to-lead** campaigns first. Responding to leads within 5 minutes can increase your chances of conversion by 400%.

WARNING

Failing to automate follow-up leads to inconsistent engagement, missed opportunities, and reduced ROI. Without a system, your database becomes an untapped resource.

RESOURCES

- **People:** The person managing your database should also be overseeing your drip campaigns. If you have a larger team, your sales manager and their assistant can manage the leads, while your marketing content creator handles the drip campaigns. If you're working solo, managing and improving your database and campaigns is non-negotiable—this is the lifeblood of your business.
- **Process:** By following the process outlined on your welcome dashboard and adhering to the steps listed above, you'll start seeing results within days. Most people experience significant results shortly after launching their AI-powered drip campaigns.
- **Tools:** With REN 360's database marketing tools, you'll convert leads into clients, nurture lasting relationships, and create a system that works for you 24/7. Don't wait—start maximizing the potential of your database today!
- REN Success System/ Growth CEO - Resources

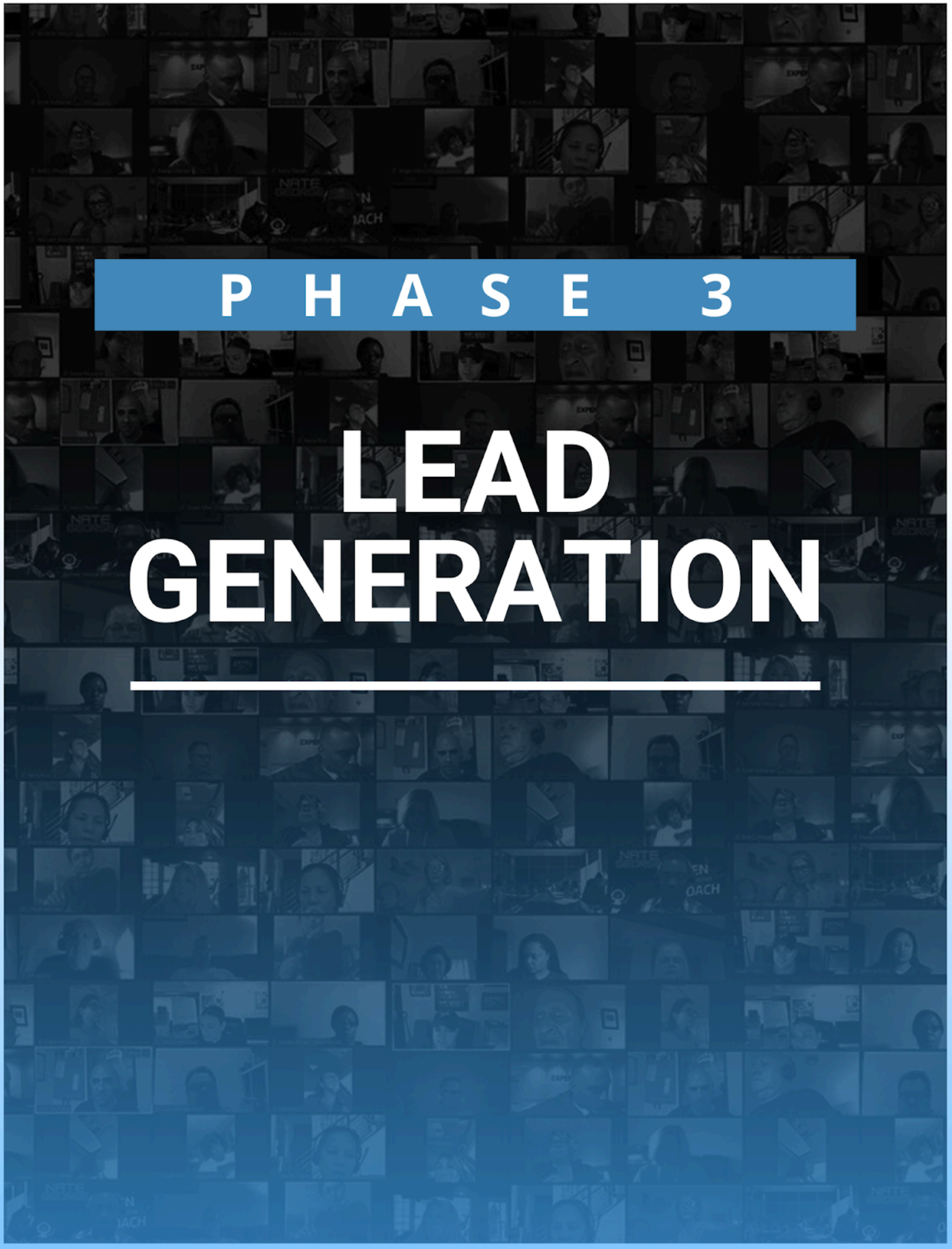
1. **Integrate an automated dialer system like REN Call Bridge to boost your speed-to-lead.**

2. **Use REN AI Assistant to help you create the content for multichannel speed-to-lead, long-term follow-up, and revival campaigns.**

3. **Upload these into REN CRM 2.0.**

4. **Use REN Gifting to create automated gifting campaigns.**

5. **Use REN SocialSphere and REN Paid Ads to create and schedule social posts and retargeting content to engage with your database.**



PHASE 3

LEAD GENERATION

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CHAPTER 6

TCPA Compliance

Ensuring Compliance Across Communication Types – Including Cold Calling, Human Outreach, Automation, and AI

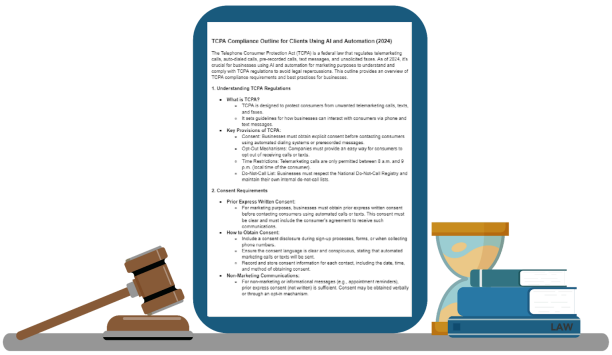
CHAPTER 6: TCPA Compliance

Ensuring Compliance Across Communication Types – Including Cold Calling, Human Outreach, Automation, and AI

Big Idea

Compliance with communication regulations, including the **Telephone Consumer Protection Act (TCPA)**, is not just about avoiding fines—it's about ensuring that your outreach efforts are ethical, effective, and legally sound. Whether you're making **cold calls**, engaging in **1-on-1 human interactions**, leveraging **mass outreach**, or utilizing **AI-powered automation**, each communication method has specific consent requirements.

Understanding how consent applies to each communication channel is critical for protecting your business from legal risks while fostering trust with your audience. Cold calling, in particular, requires special attention because of its strict compliance requirements under federal and state laws.



Key Stats

- **$500–$1,500 per violation**: Fines under TCPA for non-compliant communication, including cold calling.
- **91% of adults**: Say they never answer unknown phone numbers, making compliant, strategic outreach even more critical.
- **80% of businesses**: Use multiple communication channels, increasing the complexity of managing consent and compliance.

A Cold Calling Compliance Misstep

A real estate company heavily relied on cold calling for lead generation. They purchased a list of "data" that another company sold to them as "farming" data, not explaining to them that in order to use automation, mass marketing, and Ai technology, they have to give written consent and if they were paying for leads that opted into 3 party companies, consent needed to be given to each person that bought the lead, that consent can not

be shared unless their business name was actually in the terms. They began outbound calls using both AI, ringless voice, and text.

Over time, complaints came in, claiming they never provided consent for the company to contact them. Several leads filed formal complaints, resulting in significant fines and reputational damage.

The company had to halt operations, reassess its outreach strategy, and implement strict compliance measures. They rebuilt their process by:

1. Scrubbing all leads against the DNC Registry.
2. Verifying consent for each lead.
3. Shifting to AI tools for segmentation and compliance checks.

Breaking Down Compliance by Communication Type

1. Cold Calling - Cold calling is subject to strict rules under TCPA and state laws.

- **Allowed**:
    - Calls to individuals **not on the DNC list** and with no prior opt-out.
    - Calls to leads who have provided **prior express consent**, even if on the DNC list.
    - Transactional calls (e.g., service updates or appointment confirmations) with **prior express consent**.
- **Not Allowed**:
    - Calls to numbers on the **National DNC Registry** or **internal DNC lists** without explicit consent.
    - Marketing or telemarketing calls using autodialers or prerecorded messages without **prior express written consent**.
    - Calls outside the permissible hours of **8:00 a.m. to 9:00 p.m. (local time of the recipient)**.

2. Human 1-on-1 Outreach - This involves personal outreach without automation.

- **Allowed**:
    - Transactional calls and texts with **prior express consent**.
    - Marketing calls/texts with **prior express written consent**.
    - Emails under the **CAN-SPAM Act**, provided they include unsubscribe options.
    - Direct mail campaigns (no consent required).
- **Not Allowed**:
    - Cold calls or marketing calls to DNC-listed numbers without explicit written consent.
    - SMS/MMS texts sent without written consent.

3. Mass Outreach - Sending identical messages to multiple recipients, either manually or in bulk.

- **Allowed**:
    - Transactional bulk calls and texts with **prior express consent**.
    - Bulk marketing emails under CAN-SPAM rules with clear opt-out mechanisms.
    - Direct mail campaigns (no consent required).

- **Not Allowed**:
    - Bulk marketing calls/texts without **prior express written consent**.
    - Outreach to shared or purchased lists without verifying consent.

4. AI-Powered Automation - Automated communication through AI tools like autodialers, text platforms, or email systems.

- **Allowed**:
    - Transactional calls/texts with **prior express consent**.
    - Marketing campaigns with **prior express written consent**.
    - Automated emails under CAN-SPAM rules with opt-out mechanisms.
    - AI-generated direct mail (no restrictions).
- **Not Allowed**:
    - Automated marketing calls/texts to individuals without written consent.
    - Any communication with DNC-listed or opt-out leads.

Action Steps:

1. Audit Your Database

- Review all leads to verify:
    - Whether consent was given.
    - The specific communication methods allowed (e.g., calls, texts, emails).
    - Whether leads are on the **DNC Registry** or your internal DNC list.

2. Segment Leads by Communication Channel

- Group leads into categories:
    - **Cold calling permitted**: Leads not on the DNC list and with no prior opt-out.
    - **Transactional-only consent**: Leads who opted in for updates or reminders.
    - **Marketing-approved consent**: Leads with express written consent for promotional outreach.

3. Update Consent Collection Processes

- Revise opt-in forms to include:
    - Specific mention of your business.
    - Clear options for consent by communication type (calls, texts, emails).

4. Implement Compliance Tools

- Use software to:
    - Scrub lead lists against the DNC Registry.
    - Track and log consent details for every lead.
    - Automate opt-out processing.

5. Launch Re-Permission Campaigns

- Re-engage leads with unclear consent using compliant emails or direct mail.
    - Example: *"We're updating our communication preferences. Please confirm how you'd like to hear from us."*

6. Train Your Team

- Provide training on:
    - TCPA and CAN-SPAM rules for cold calling and other outreach.
    - Scripts and best practices for compliant communication.

Cold calling and other communication methods require a nuanced understanding of compliance rules. Whether you're making personal calls, running mass campaigns, or using AI-powered tools, ensuring consent aligns with each communication type is essential to avoid fines, protect your reputation, and maximize engagement.

Invest in compliance software that integrates with your CRM to automate consent tracking, DNC scrubbing, and segmentation by communication type.

Never rely on purchased lead lists without verifying consent. Non-compliant calls or automated outreach can result in costly fines and legal challenges. **If you're purchasing leads from a third party and they share that lead with another business, you must ensure that your name or business name is included in the terms. Without this, you do not have consent.**

- **People:** Consult with an attorney to ensure that your marketing practices are fully compliant with legal requirements.
- **Process: TCPA Compliance Checklist:** Access this guide in the REN 360 resource section on your dashboard to ensure your outreach practices comply with the Telephone Consumer Protection Act (TCPA).

- **Tools: DNC Scrubbing Tools:** Use these platforms to verify phone numbers against the National Do Not Call (DNC) Registry, ensuring that you're not contacting any numbers on the list.
- REN Success System/ Growth CEO - Resources

By tailoring your outreach strategies to the rules of each communication type, including cold calling, you can drive engagement, maintain compliance, and safeguard your business.

1. **Audit and segment your database.**

2. **Review and update consent collection processes. Ensure that every opt-in form has the correct legal language.**

3. **Join Your REN 360 Workshop and Open Office Hours if you have any additional questions about TCPA compliance.**

4. **Train your team on compliance standards.**

Disclaimer

The information provided in this document is for **general informational purposes only** and is not intended as legal advice. While every effort has been made to ensure the accuracy and completeness of the information, laws and regulations, including those related to the **Telephone Consumer Protection Act (TCPA)** and other communication compliance requirements, are subject to interpretation and change.

You should consult with a qualified attorney or legal professional for advice tailored to your specific circumstances and jurisdiction. **We make no representations or warranties**

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CHAPTER 7

Target Marketing

CHAPTER 7: Target Marketing

“Everyone is not your customer." - Seth Godin

“A niche is not limiting—it’s freeing. It gives you clarity, direction, and the ability to dominate a specific market.”

The Strategy

In today's highly competitive market, where businesses typically operate with constrained resources, the importance of focus cannot be overstated. That’s where the value of targeted messaging becomes clear. By tailoring your services to a **specific niche,** you add value and enhance your ability to meet their unique needs.

This targeted approach fosters customer loyalty, ultimately driving the most crucial piece of your business: cash flow. Therefore, creating a detailed client avatar is beneficial and essential to steering a business toward success in a crowded marketplace.

The Power of Focus

In the beginning, like many entrepreneurs, I was trying to do it all. Our strategy was scattershot—indiscriminately purchasing leads from various platforms, chasing every opportunity without a clear focus. It felt like we were doing the right thing, casting a wide net to grow our business. But the truth was, we were sinking. Leads were hard to convert, money was bleeding out, and the business teetered on the edge of failure.

It was a moment of reckoning: **what if the problem wasn't effort, but direction?**

Finding Focus Amid Distractions

One day, after reviewing our mounting losses, it became painfully clear that this broad, unfocused approach wasn't sustainable. We needed a change—something bold, something precise. That's when the idea hit: **what if we dominated just one niche or niches?**

At first, the idea seemed risky. Narrowing our focus felt counterintuitive. Wouldn't it limit our opportunities? But deep down, I knew that without focus, we couldn't master anything. So, we made the leap. We chose to target **cash offer leads**, zeroing in on **expired listings** and **For-Sale-By-Owners (FSBOs)**.

Why? Because this niche aligned with our core story and mission. We understood the frustrations FSBOs faced, and they resonated with our values. While other agents ignored this niche or underestimated its potential, we saw an opportunity to build something exceptional.

Crossing the Threshold: Implementing a New Strategy

With our niche defined, we developed a multi-channel advertising and marketing campaign to target FSBOs and expired listings. The shift wasn't easy. At first, we faced skepticism, both from our team and industry peers. Narrowing our focus felt like swimming against the tide, but I was convinced this was the path forward.

Slowly but surely, the results began to speak for themselves. Our efforts turned into real wins:

- Consistent inventory of 20-30 active listings at any given time.
- Recognition as leaders in our chosen niche.

By dominating one area, we created momentum that extended beyond FSBOs. We expanded our strategy to help others with expired listings, further solidifying our expertise and reputation.

Mastering the Niche: The Road to Expansion

Once we mastered our first niche, we realized we had a blueprint for success. Following the same formula, we methodically entered new niches. Each step reinforced our belief in the power of a targeted approach:

- We created a second income stream by teaching other agents how to dominate their own niches.
- We developed a lead-generation program that earned us referral fees, creating a

sustainable pipeline of opportunities.

One of our most creative moves was acquiring businesses already established in the niches we wanted to enter. When a leading REO brokerage in our town retired, we negotiated an acquisition of their accounts. Overnight, we added 15-20 listings per month to our brokerage. This strategic move not only strengthened our business but set the stage for future growth.

A New Frontier: Applying the Strategy to Digital Marketing

As we ventured into digital marketing and consulting, we initially made the same mistake: trying to tackle everything at once. This time, experience guided us. We stepped back, identified the most significant problem we could solve, and focused exclusively on **lead management and conversion**.

This targeted approach allowed us to refine our processes and build a track record of success. By helping businesses manage cold and warm leads more effectively, we created a scalable, results-driven service while enabling our clients to focus on hot leads and client satisfaction. Now, we focus on developing different divisions that have different focuses to help throughout the flywheel as our demographic has changed.

The Reward: A Multi-Million Dollar Business

Targeting niches enabled us to build a multi-million-dollar business and positioned us as one of the fastest-growing companies in the country. By dominating one area at a time, we established credibility, created sustainable growth, and unlocked new revenue streams.

The Lesson: The Power of Mastery

Focusing on a niche isn't about limiting your potential—it's about creating a foundation for mastery. By concentrating on a specific area, you build expertise, trust, and systems that can be scaled into new opportunities. Whether in real estate, marketing, or consulting, the formula remains the same: **dominate one niche, then expand strategically.**

If you're feeling spread too thin, consider this: what would happen if you poured all your effort into mastering one area? Could that become the launchpad for something extraordinary? For us, the answer was a resounding **yes.**

Finding Your Niche and Creating an Avatar

This guide will walk you through the process of identifying your niche and developing a compelling client avatar to execute your real estate marketing strategy effectively.

Step 1: Self-Assessment (Strengths & Interests)

- **Action:** Dedicate time to assess your skills, interests, and areas where you excel in the real estate market. This could involve taking personality or skills assessments, or reflecting on past successes.
- **Tip:** Consider your preferred transaction types (e.g., residential vs. commercial), property types (e.g., single-family homes, apartments), or client profiles (e.g., first-time buyers, investors).

Step 2: Market Research

- **Action:** Conduct thorough market research to identify potential niches within the real estate industry. This could involve:
    - **Analyzing local market trends:** Identify underserved areas, emerging neighborhoods, or specific property types in high demand.
    - **Competitor analysis:** Research how other agents are positioning themselves and identify potential gaps in the market.
    - **Industry publications and reports:** Stay informed about current industry trends and potential niche opportunities.
- **Tip:** Leverage resources like market reports, online real estate forums, and local industry events to gather insights.

Step 3: Define Your Target Audience

- **Action:** Based on your self-assessment and market research, determine the specific group of clients you want to focus on.
- **Considerations:**
    - **Demographics:** Age, income level, location preferences.

- **Lifestyle:** Needs, interests, and motivations of your ideal client.
- **Buying/Selling Stage:** First-time buyers, downsizers, investors, etc.

Step 4: Develop Your Unique Selling Proposition (USP)

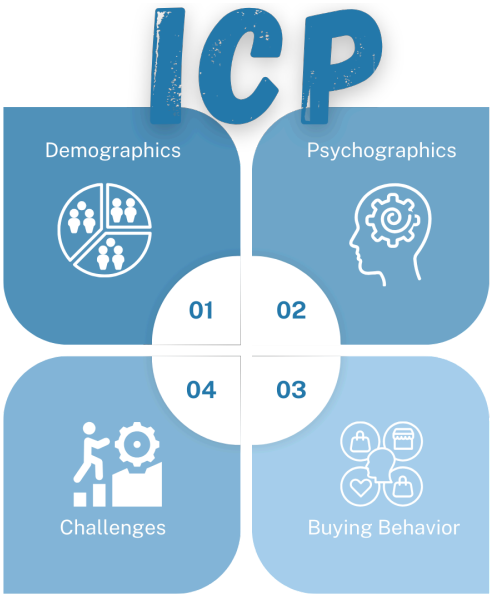
- **Action:** Craft a USP that clearly communicates how your skills and key expertise address the unique needs and preferences of your niche market.
- **Tip:** Focus on the value you bring beyond just selling real estate. This could be your negotiation skills, local market knowledge, or a specific service you offer (e.g., staging assistance).

Step 5: Create Your Client Avatar

- **Action:** Develop a detailed profile of your ideal client, also known as a client avatar.
- **Include details like:** Demographics, profession, lifestyle, online habits, challenges faced in the real estate process, and what they value most in an agent.
- **Tip:** You can create multiple avatars for different niche markets you might serve.
  - *"REN, help me create a customer avatar around the niche of ___. Research their fears, desires, daily challenges, pain points, and motivations, as well as their age demographics, and create three examples of who my customer avatar could be."*

Step 6: Test & Refine Your Avatar

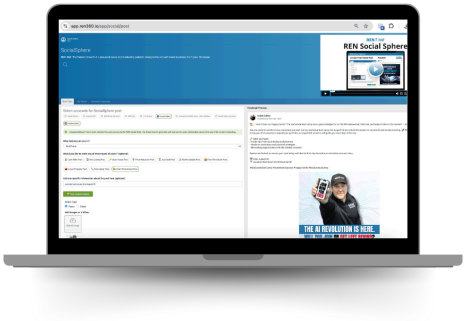
- **Action:** Don't assume you've got it perfect on the first try! Test your avatar with a segment of your target audience through surveys, focus groups, or social media polls.
- **Gather Feedback:** Ask questions to validate if your avatar accurately represents your ideal client and if your USP resonates with them.
- **Make Adjustments:** Based on the feedback, refine your avatar to ensure it's a true reflection of your target audience.



Step 7: Integrate Avatar in Marketing Strategy

- **Action:** Ensure your client avatar informs all aspects of your marketing strategy.
- **How to do it:**

- **Website & Social Media:** Use language and visuals that resonate with your avatar in website content, social media posts, and marketing materials.
- **Content Marketing:** Create content (blog posts, videos, etc.) that addresses your avatar's specific needs and interests.
- **Paid Advertising:** Tailor your paid advertising campaigns to target demographics, interests, and online behavior that align with your client avatar.
- **Messaging:** Craft your communication style and messaging to be relevant and engaging for your ideal client.



Step 8: Leverage Technology & Social Media

- **Action:** Identify technology tools and social media platforms that your target audience frequents.
- **Examples:**
  - **Social Media:** Consider platforms like Facebook, Instagram, LinkedIn, or Next Door depending on your client avatar's demographics and online habits.

Technology Tools: Explore tools for real estate marketing, CRM platforms, or scheduling software that can streamline your client interactions.

- **Tip:** Don't spread yourself too thin! Choose the tools and platforms that best reach your target audience and can be effectively managed within your time constraints.

Step 9: Monitor Trends & Feedback

- **Action:** Stay informed about market trends and regularly seek feedback from clients to identify potential shifts in client needs or preferences.
- **How to do it:**
    - **Market Research:** Continually review market reports and industry trends.
    - **Client Feedback:** Solicit feedback through surveys, post-transaction evaluations, or casual conversations with clients.

With the information created from this prompt, you can identify what is important to your ideal clients and tailor your marketing and sales efforts around that. If you're recruiting, you must attract someone who can work with your management style; clearly define your style, including expectations in your prompt.

If you don't clearly define your ideal client or agent, you'll attract the wrong people and create friction, resulting in lost time, money, and energy for everyone involved. Take the time to build out your ICP thoroughly and accurately.

- Provide your AI Assistant with as much detailed information about your past clients as possible. This will help the AI craft more effective and personalized sales copy.
- *Building a Story Brand* by Donald Miller: A valuable resource for creating a clear, compelling narrative for your business.
- REN Success System/ Growth CEO - Resources

1. **Use REN AI Assistant to conduct a thorough self-assessment of your strengths and interests. Compare this with current market research to determine any gaps and opportunities where you can stand out; this will be your niche.**

2. **Use REN AI Assistant to learn more about this niche's pain points and motivations to develop a Unique Selling Proposition (USP).**

3. **Use REN AI Assistant to create a client avatar using details like demographics, profession, lifestyle, online habits. Reference the prompt on page 84.**

4. **Include this avatar in your multichannel marketing strategy. REN Paid Ads, REN Social Sphere, REN AI Voice/Text, and any email campaigns in REN CRM should all reference this client avatar.**

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CHAPTER 8

Offer Secrets

Crafting the Ultimate Irresistible Offer: The Power of Focused Value

CHAPTER 8: Offer Secrets

Crafting the Ultimate Irresistible Offer: The Power of Focused Value

Big Idea

Creating an irresistible offer is not just about presenting your product or service—it's about addressing your customer's deepest frustrations and desires while differentiating yourself from competitors. Your offer should make the customer feel like their problem has disappeared and their life has improved. It should also offer more "preserved value" than your competitors, with value tailored to meet the specific needs of your clients.

Key Stats:

- **91% of customers** prefer businesses that tailor offers to their specific needs and pain points.
- Businesses with a clearly defined unique value proposition (UVP) see **2x higher conversion rates** than those without.
- Companies that focus on niche offers grow revenue **4x faster** than generalists.

Crafting an Irresistible Offer That Changed Everything

When my partners and I launched our real estate business, we were like many others—trying to make a name for ourselves in a crowded and competitive market. We offered what everyone else did: "great service," "expert knowledge," and "dedication." But those promises were meaningless because they didn't make us stand out, and worse, they didn't connect with clients in a way that inspired action.

Leads trickled in inconsistently, and our competition often undercut us on price. We were stuck in a cycle of fighting for attention but losing the battle. **I knew something had to change, or we wouldn't make it.**

The Turning Point

The breakthrough came when I started studying under Dan Kennedy, one of the greatest marketing minds of all time. During a session, he posed a question that stopped me in my tracks: ***"What makes you different from everyone else who offers a similar service?"***

That question hit hard. I realized we were blending in with the crowd, offering generic promises that didn't resonate. Kennedy's lesson was simple but transformative: **to win**

in business, you need to create a unique offer that makes clients say, "I need this!" Instead of trying to out-market our competitors, we needed to out-think them.

The Transformation

We decided to focus on a specific audience: **For Sale By Owners (FSBOs)** and **expired listings**—sellers who were frustrated with the process and hadn't found success. These niches were underserved and deeply motivated, but their frustrations were real. Many FSBOs struggled to sell because they didn't understand the complexities of marketing and negotiation. Expired listings often felt let down by their previous agents.

We crafted a compelling offer tailored to their needs. We promised:

1. A guaranteed "**done for you home selling vip package"**
2. A detailed and **customized marketing plan** to sell their property.
3. A **performance guarantee** that ensured accountability.

We called our offering the **Home Seller VIP Program**, which provided tiered service options at commission rates of 4%, 5%, 6%, 7%, and even 10%. The majority of clients chose the 6% and 7% tiers, as the value we delivered clearly matched the commission rate, making the decision easy for them. For those who wanted or needed a deal, the 4% and 5% options allowed us to retain clients who might have otherwise gone elsewhere.

The program set us apart from competitors by offering clear, tiered levels of service, showcasing the value tied to each percentage. The 10% tier was our premium "white-glove" service, where we managed everything related to selling their home—from repairs and staging to complete move-out assistance. This approach not only maximized client satisfaction but also positioned us as a unique and flexible option in a crowded market.

This wasn't just another sales pitch—it was a solution to their problems, framed in a way that no competitor was offering.

The Home Seller VIP Program seamlessly integrates into the Flywheel Model by creating momentum across the entire client journey. By offering tiered services tailored to different seller needs, it ensures a frictionless experience that builds trust and

satisfaction from the start. Sellers not only see the value we provide but also become advocates for our business, generating referrals and repeat opportunities. Each tier reinforces the Flywheel's stages—**Reaching** clients with differentiated offers, **engaging** them through customized service, and **nurturing** them with outcomes that exceed expectations, fueling continuous growth and loyalty.

The Results

Within months, everything changed. Our listings soared, and leads came in faster than we could handle. We were no longer just another real estate team; we became the go-to experts for FSBOs and expired listings.

The volume of leads grew so much that we created a referral program to handle overflow. This program allowed us to expand our network, work with other agents, and generate additional revenue streams. By focusing on a niche and crafting an irresistible offer, we didn't just survive—we thrived. This method helped us do over **$1.4 billion in real estate sales** between our brokerage at the time and our referral partner program that grew to over 700 referral agents.

The Lesson

The key to success wasn't working harder or spending more on ads. It was about narrowing our focus, understanding our audience's pain points, and delivering a solution so compelling that clients couldn't resist. The lesson from Dan Kennedy and this journey taught me that the power of a focused and irresistible offer can transform any business.

If you're struggling to stand out in your market, stop trying to do everything. **Find your niche. Craft your offer. Solve your clients' biggest problems.** It's not easy, but when you get it right, the results are life-changing.

Step-by-Step: Crafting Your Irresistible Offer

Step 1: Understand Your Niche and Target Market

- **Research deeply**: Identify pain points, frustrations, and motivations of your audience.
- Use AI tools like REN to create a detailed **customer avatar**:
    - What are their biggest problems?
    - What outcomes are they seeking?
    - What barriers are stopping them?

Step 2: Solve the Right Problems

- Brainstorm solutions to your audience's top pain points.
- Use AI prompts like:
    - *"REN, list the biggest challenges FSBOs face and suggest innovative solutions to address them."*

Step 3: Craft a Multi-Tier Pricing Model

- Develop 3-4 levels of service to match different budgets and needs:
    1. **Entry-Level**: Basic solutions for cost-conscious clients.
    2. **Mid-Level**: Full-service package addressing all key needs.
    3. **Premium**: Done-for-you, high-touch services with added guarantees.
- Ask REN for pricing strategies: *"Help me develop pricing tiers for these services while emphasizing value over cost."*

Step 4: Add Risk Reversal Through Guarantees

- Create bold guarantees that reduce the risk for your client:
    - Money-back guarantees.
    - Performance-based promises (e.g., "Sell your home in 60 days or we'll buy it").
- Prompt: *"REN, suggest creative guarantees for a real estate business targeting FSBOs."*

Step 5: Create Scarcity and Urgency

- Use time-sensitive offers or exclusive access:
    - *"Only available to the first 10 clients."*
    - *"Offer expires at the end of the month."*
- Make scarcity genuine to build trust.

Step 6: Name Your Offer

- Choose a name that highlights the value and outcome, e.g., *"Seller Success Blueprint"* or *"Stress-Free Sale Guarantee."*

Step 7: Train Your Team

- Ensure every team member understands the offer and can communicate its UVP confidently.
- Conduct role-plays and feedback sessions to refine delivery

Step 8:

- Create a client journey road map that matched delivering each step or accept off the offer in a check list format so the service is the same for every single client and the client can check off the process as they go along with you.

An irresistible offer addresses your customer's core problems, differentiates you from competitors, and creates a clear pathway for your team to succeed. It combines a deep understanding of your niche with strategic pricing, risk reversal, and effective communication. Done right, this offer becomes the cornerstone of your sales system and the catalyst for exponential growth.

Focus on **value over price**. Competing on price alone is a race to the bottom. Instead, highlight the unique outcomes and advantages your offer delivers, and position your business as the premium solution.

Avoid creating offers without fully understanding your audience's pain points or testing your pricing structure. A poorly designed offer can confuse customers, hurt your credibility, and lead to missed opportunities.

- **Books**:
  - *The Irresistible Offer* by Mark Joyner.
  - *Blue Ocean Strategy* by W. Chan Kim and Renée Mauborgne.
  - *$100M Offers* by Alex Hormozi.
- **Tools**:
  - REN 360 for AI-driven lead management.
  - Canva for designing marketing visuals.
  - Slack for team collaboration and communication.
  - REN Success System/ Growth CEO - Resources

1. **Use REN AI Assistant to create a detailed list of your niche/client avatar's pain points, desires, and motivations. Then, ask how you can solve these problems and position yourself as an expert.**

2. **Use REN AI Assistant to help you develop a multi-tier pricing model to match different budgets and needs.**

3. **Use REN AI Assistant to develop bold guarantees that align with the needs of your client avatar.**

4. **Create scarcity and urgency with limited-time or special offers that speak directly to your target audience's pain points and needs.**

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CHAPTER 9

Flywheel Funnel Secrets

How to Use AI to Create Flywheel Sales Funnels to Generate Leads, Getting Appointments On Your Calendar, and Create a Systematic Process to Generate More Repeat and Referrals.

CHAPTER 9: Flywheel Funnel Secrets

How to use AI to create Flywheel Sales Funnels to generate leads, getting appointments on your calendar, and create a systematic process to generate more repeat and referrals.

***"You're one funnel away from changing your life."* - Russel Brunson**

Big Idea

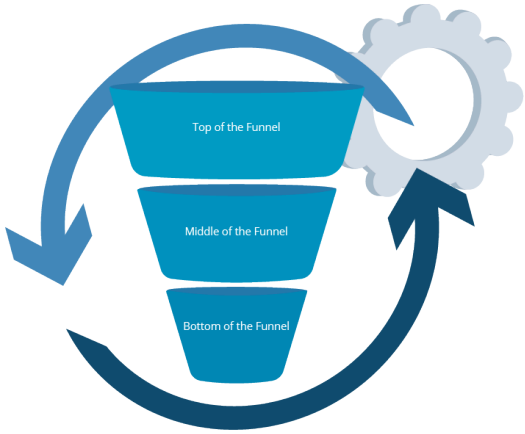
Traditional websites act as static brochures, offering many options but often failing to guide visitors toward a clear next step. **Funnels**, on the other hand, are laser-focused, directing potential customers through a targeted pathway designed to convert leads into clients. This transformation in how we approach lead generation and conversion can mean millions in revenue.

Key Stats:

- Companies using lead funnels see **2x higher conversion rates** than those relying on traditional websites.

- Funnels helped my businesses generate over **$20 million revenue and GCI** in real estate, coaching, and consulting revenue.
- With optimized funnels, customer acquisition costs can drop by **50% or more**, boosting profitability.

How Funnels Rescued My Business

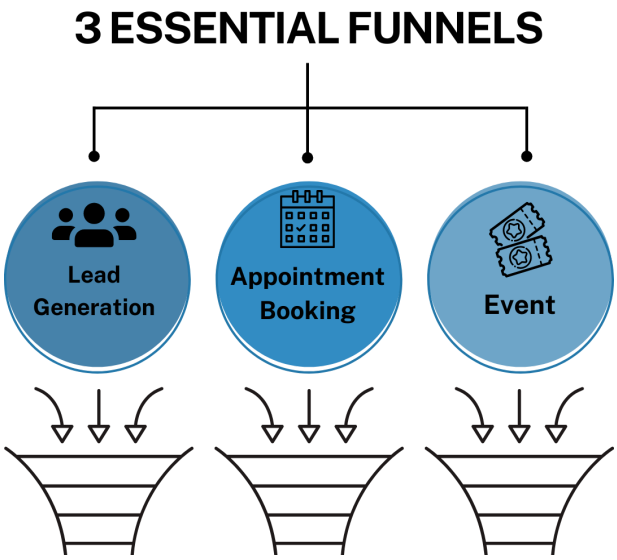


In 2017, our real estate team was thriving, with 95% of our leads coming from outbound cold calling. We had honed our scripts, processes, and systems, but everything changed overnight when cold-calling laws tightened, and spam detection technology advanced. Suddenly, it took **double the calls** to have the same number of conversations, driving up our appointment costs and slashing our profits. We were making millions but hemorrhaging cash just as fast.

Desperate for a solution, I stumbled upon funnels. At first, I was skeptical. It seemed too good to be true—a system that could attract leads, engage them, and convert them into clients without the constant grind of outbound calls. I built my first funnel… and it **failed miserably**.

I almost gave up, but my mentor's words kept ringing in my ears: ***"If someone else is succeeding with a strategy, it's not the strategy that's broken—it's how you're using it."***

Determined to get it right, I researched successful funnels in my industry and built one modeled after them, but customized to my audience. I launched it nervously, unsure if it would work. By Sunday night, I couldn't believe my eyes—**100 leads** had poured in over the weekend.



That moment changed everything. Funnels became the backbone of our business. Over the next few years, we used them to generate thousands of leads each month solidifying our position as one of the fastest-growing real estate and coaching companies. Funnels didn't just save our business—they propelled us to new heights.

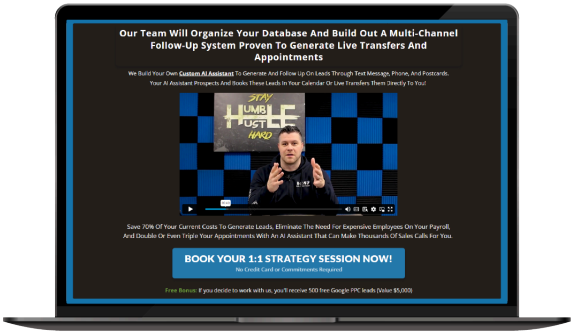
Step-by-Step: Building a Flywheel Funnel That Works

Step 1: Reach (Generating Awareness)

- **Identify Your Target Audience**:
  - Determine who you want to attract (e.g., first-time homebuyers, FSBOs, investors).
  - Example prompt for REN:
    "REN, create a detailed avatar for FSBOs, including their challenges, goals, and behaviors."
- **Drive Traffic to Your Funnel**:
  - Use paid ads (Google, Facebook) targeting your audience with compelling hooks.
  - Leverage social media content that resonates with their needs.
    - Example: *"Frustrated FSBOs? Download our free guide to selling your home without the hassle."*

Step 2: Engage (Building Interest and Connection)

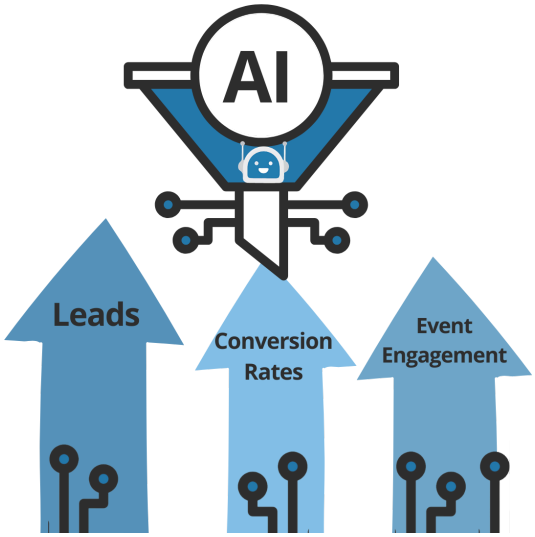
- **Create a Valuable Lead Magnet**:
  - Examples:
    - "5 Mistakes FSBOs Make When Selling Their Homes"
    - "Your Free Home Value Report"
  - Use REN to draft and design engaging resources.
    - Example prompt: *"REN, write a 5-step guide to help FSBOs maximize their home sale price."*
- **Develop a Landing Page with a Video Offer**:
  - For an example, go to RENDatabasePro.com
  - Design landing pages that highlight your lead magnet and include a CTA to watch a free video.
  - Video Example:
    "How Our Proven Strategy Can Sell Your Home in 30 Days or Less."
  - Prompt REN for landing page copy:
    "REN, create persuasive sales copy for a landing page targeting FSBOs with a lead magnet."



Step 3: Nurture (Converting and Building Loyalty)

- **Automated Follow-Up Campaigns**:
  - Send a mix of emails, text messages, and voicemail drops to nurture leads.
  - Include educational content, testimonials, and calls to action for booking appointments.
    - Example prompt: *"REN, create a 10-email drip campaign for FSBOs, designed to nurture and convert leads."*
- **Book Appointments**:
  - Embed an appointment scheduler like Calendly directly into emails and landing pages.
  - Offer value-driven consultations, e.g., "Free Home Sale Strategy Session."
- **Train Your Team**:
  - Ensure your sales team is equipped with scripts to handle objections and close deals confidently.

SUMMARY



Funnels transformed our approach to lead generation by shifting from outbound cold calls to targeted inbound strategies. They align perfectly with the Flywheel Model, creating momentum through the stages of **Reach, Engage, and Nurture**. With funnels, we reduced costs, increased conversions, and built a scalable, predictable business model.

PRO TIP

Test your funnel elements—headlines, CTAs, visuals—using A/B testing. Even small changes can significantly impact conversion rates.

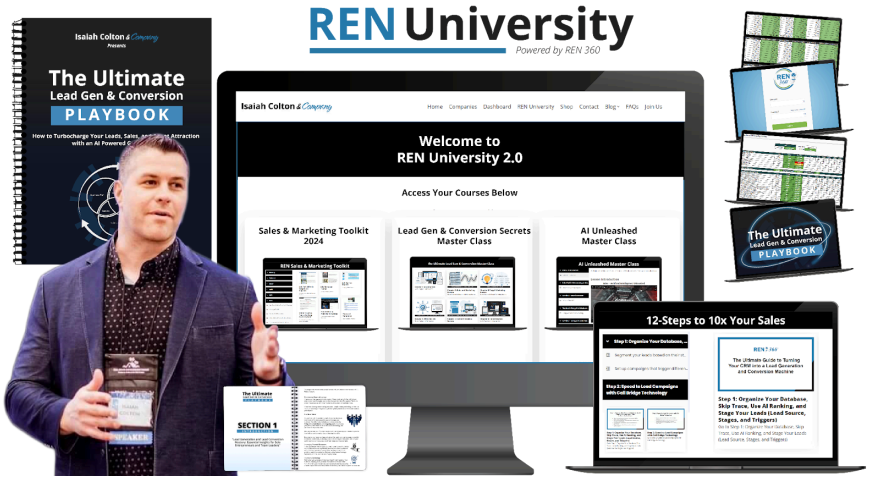
WARNING

Funnels require consistent monitoring and optimization. A “set-it-and-forget-it” approach will cause your results to plateau or decline over time.

RESOURCES

- **People -** Consider hiring a funnel builder or have your marketing team learn how to create funnels. REN can also build funnels for you. Make sure to optimize your funnel's theme weekly and integrate it into your overall marketing plan.
- **Process -** Follow the checklist provided to build your funnel according to best practices. Ensure you're using the checklist specific to the type of funnel you're building.
- **Tools -** Use the REN Funnel Builder tool to streamline your process, and be sure to link it to Google Analytics for funnel performance tracking.
    - **REN University:** Take courses on funnel strategy and execution to sharpen your skills.
    - Join the community forums and mastermind groups to gain insights from others and share experiences.
    - REN Success System/ Growth CEO - Resources

Funnels aren’t just a tool—they’re a strategy that can future-proof your business. Whether you’re just starting out or looking to scale, a well-designed funnel can create the predictable growth and financial stability you need to thrive.



1. **Go to REN CRM and click on the Funnels tab to start building your first funnel.**

2. **Use REN AI Assistant to help you create landing page copy focused on your niche and client avatar.**

3. **Use REN AI Assistant to create a lead magnet (such as a guide, checklist, etc.) to encourage engagement on the page.**

4. **Use REN AI Assistant to create a video script to match the lead magnet. Record and edit the video and add it to the landing page.**

5. **Use REN SocialSphere and REN Paid Ads to drive traffic to the funnel.**

6. **Use REN AI Assistant to develop a speed-to-lead and long-term follow-up campaign for handraisers who submit their information.**

7. **Upload those campaigns to REN CRM > Marketing > Campaigns and inside the REN AI Database Marketing tab on your REN 360 Dashboard.**

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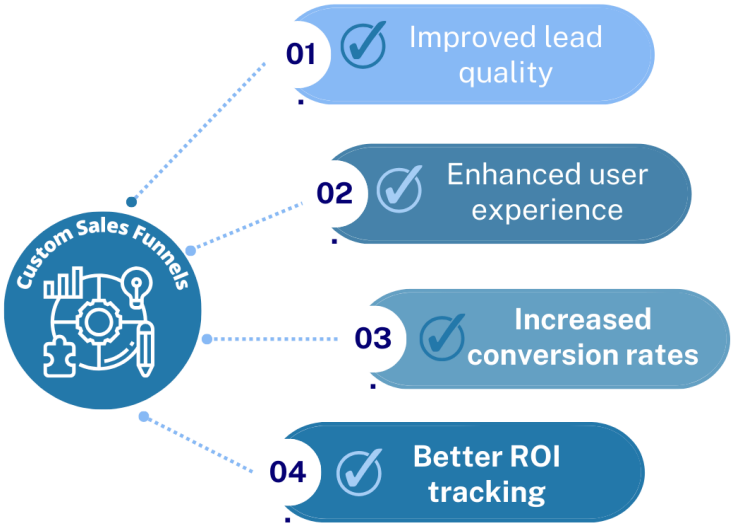
CHAPTER 10

Content Creation Secrets

CHAPTER 10: Content Creation Secrets

Big Idea

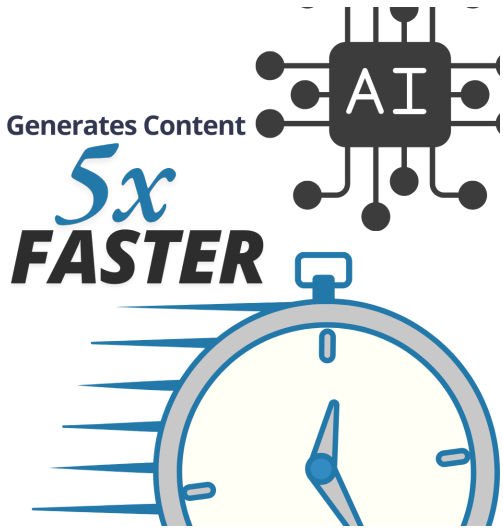
Content fuels every stage of the REN Flywheel Sales Funnel—**Reach**, **Engage**, **Nurture**, and **Advocate**—and the REN AI Assistant makes creating impactful content scalable and efficient. By automating the research, writing, and repurposing processes, you can consistently deliver value to your audience.



- 72% of marketers say consistent content creation is their most effective SEO tactic.
- Content marketing generates three times as many leads as outbound marketing and costs 62% less.
- Businesses that use storytelling in their content see engagement increase by up to 22%.

How I Transformed My Content Strategy with REN AI

When I first started creating content, I felt overwhelmed by the endless demands of staying visible online. Writing blogs, making videos, sending emails—it all felt like a full-time job. I'd spend hours researching and brainstorming, only to end up with content that didn't resonate with my audience. My Flywheel was spinning, but not at the speed I needed.



That's when I discovered REN AI. By leveraging its ability to gather insights, draft engaging content, and follow my brand's tone, I transformed my entire strategy. Suddenly, what once took days could be done in hours. Within 90 days, I had blogs that ranked, videos that engaged, and

campaigns that converted. My audience grew, my leads increased, and my Flywheel turned faster than ever before.

Step-by-Step: Creating Content with REN AI

1. Start with Research - Use REN AI to gather comprehensive research and resources on your chosen topic.

- **Recommended Prompt**: "REN AI, provide me with the latest articles, blogs, videos, stats, and news on [topic]. Focus on key insights that would engage a [specific audience, e.g., real estate agents, loan officers]."
- **Flywheel Alignment**: This research lays the foundation for your **Reach** and **Engage** stages by addressing audience pain points and aspirations.

2. Program REN AI with Your Brand Persona - Customize the AI to reflect your tone, style, and storytelling approach. Teach it to incorporate **Attractive Hero storytelling**, weaving in relatable stories from clients or your personal experiences.

- **Recommended Prompt**: "Create content in a tone that is [e.g., professional, friendly, humorous] and follows the Attractive Hero storytelling method. Incorporate stories about how [problem] was solved using [solution]."

3. Generate Content Across Formats - Leverage REN AI to create diverse types of content for every Flywheel stage:

- **Blog**:
  - **Prompt**: "Write a 1,500-word blog post on [topic], focusing on practical tips and relatable stories."
  - Align with the **Reach** stage by addressing common challenges and solutions.
- **Educational Long-Form Video**:
  - **Prompt**: "Create a detailed script for a 10-minute educational video on [topic], including actionable tips and a call-to-action for [specific outcome, e.g., signing up for a webinar]."
- **Facebook Live**:

    - **Prompt**: “Draft an outline for a Facebook Live session discussing [topic]. Include key points, questions to engage viewers, and a story demonstrating your expertise.”
- **Webinar**:
    - **Prompt**: “Create a webinar presentation on [topic], breaking it into sections with visuals, interactive Q&A, and a closing CTA.”
- **Long-Form Facebook Post**:
    - **Prompt**: “Write a detailed Facebook post explaining [topic], with a focus on storytelling and emotional connection.”
- **Podcast**:
    - **Prompt**: “Draft a podcast episode outline discussing [topic]. Include key points, an anecdote, and takeaways for listeners.”
- **Short Videos for Social Media**:
    - **Prompt**: “Script seven short videos (30-60 seconds) on [topic], focusing on quick tips, stats, or humorous insights.”
- **Funny Memes**:
    - **Prompt**: “Generate seven meme ideas on [topic], blending humor with audience relatability.”
- **Quotes and Stats**:
    - **Prompt**: “Compile quotes and stats from research to use in social media posts or presentations on [topic].”

4. Create an Email Drip Campaign – Engage leads through a sequence of emails that nurture them through the Flywheel.

- **Prompt**: “Draft a five-part email drip campaign on [topic]. Include storytelling in the first email, educational content in the second, and a CTA for [specific action, e.g., booking a call] in the last.”

5. Design Questions for Your Private Facebook Group - Drive community engagement by asking thought-provoking questions.

- **Prompt**: “Suggest three questions related to [topic] to post in my private Facebook group to spark discussion and engagement.”

6. Develop Awareness, Conversion, and Retargeting Ads - Use REN AI to create ads that align with your Flywheel stages.

- **Prompt**:
    - Awareness: “Write an ad to introduce [topic] and build awareness.”

- Conversion: “Write an ad targeting warm leads, offering [incentive or solution].”
- Retargeting: “Write an ad to re-engage users who interacted with [specific content].”

REN AI as Your Content Machine

The REN AI Assistant streamlines every step of content creation, allowing you to focus on strategy while automating the details. From blogs to social media posts, videos to ads, REN AI ensures that your content fuels every stage of the Flywheel—driving engagement, nurturing leads, and creating advocates.

Start small and scale. Focus on one or two content types first, such as blogs and short videos, before expanding into more formats. Repurpose content across platforms to maximize reach with minimal effort.

Don’t skip the customization step. Program REN AI with your tone, audience preferences, and storytelling style. Generic content won’t resonate or convert as effectively as tailored material.

- **REN AI Training Guide**: Learn how to customize the AI with your tone and style.
- **Content Repurposing Checklist**: Step-by-step guide for turning one piece of content into multiple formats.
- **Webinar Templates**: Plug-and-play formats for educational webinars.

- **Social Media Toolkit**: Tools and tips for maximizing your social media impact.
- **Email Drip Campaign Scripts**: Pre-written sequences for nurturing leads through the Flywheel.
- REN Success System/ Growth CEO - Resources

With REN AI, you'll have the tools to create, scale, and automate your content strategy—fueling your Flywheel and driving your business forward. Let's get started!

1. ***If you have gone through the previous chapters, these steps should be completed already!*** **If not, we've included a condensed version below, but encourage you to go back and read chapters 1-9 for a more comprehensive breakdown.**

2. **Program your REN AI Assistant to match your brand persona, goals, and any additional details connected to your business. (Prompts are available in Chapter 2).**

3. **Use REN AI Assistant to compile research on your niche and target audience, as well as current industry trends.**

4. **Use REN AI Assistant to take this research and generate content and campaigns across multiple formats including blogs, educational videos, emails, texts, webinars, social media posts, and podcasts.**

5. **Go to the REN 360 Dashboard to connect your campaigns through REN CRM > Marketing > Campaigns and inside your REN Database AI Marketing and REN Lead Generation tabs.**

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CHAPTER 11

Lead Generation Secrets

CHAPTER 11: Lead Generation Secrets

Big Idea

Lead generation is the art and science of identifying potential clients, initiating conversations, and converting them into loyal customers. For real estate agents and loan officers, mastering lead generation is the key to building a predictable and scalable business. With so many avenues to generate leads—social media, referrals, paid ads, events, and more—it's easy to get overwhelmed. But success in lead generation isn't just about knowing strategies; it's about executing the right tactics in the right order based on your **mindset, activity level, skills, and budget**.

This introduction lays out the foundation for lead generation mastery. Each person's journey will look different based on where they are in their business, but the core principles remain the same. Some strategies will take time and hustle, while others will require money and finesse. **The goal is to develop a diversified lead-generation system** that brings in leads consistently—no matter the market conditions.

My Story

When I first started in real estate, I thought lead generation was simple. You post a few ads, attend a few networking events, and the clients come pouring in. At least, that's what I was told. But the reality was far different. Leads weren't pouring in—they were trickling, and the trickle wasn't enough to sustain my business.

I remember one moment vividly. It was a Wednesday afternoon, and I was sitting at my desk staring at an empty calendar. The buzz of starting my own business had worn off, replaced by anxiety about where my next client would come from. I had bills piling up, a team looking to me for direction, and a sinking feeling that I was doing something wrong.

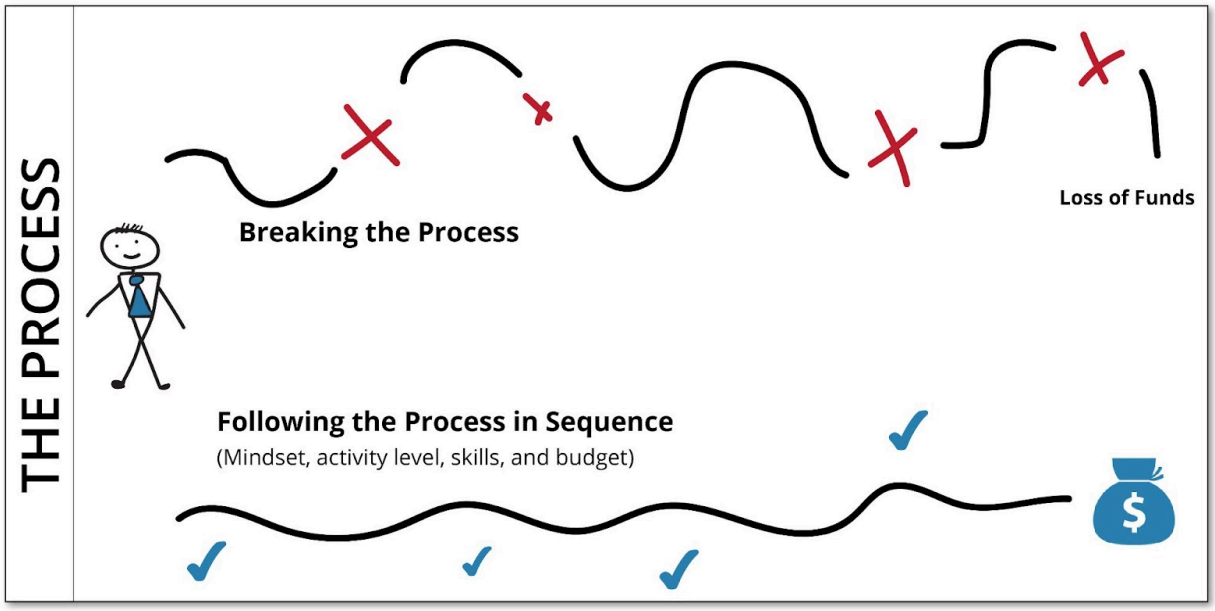
The problem wasn't effort—I was working hard. I was posting on social media, calling my sphere of influence, and even spending money on ads. But everything felt random, unconnected, and ultimately ineffective. I didn't have a system. I was throwing spaghetti at the wall, hoping something would stick.

The Turning Point: Finding the Missing Link

One day, I attended a training session on lead generation. The instructor said something that hit me like a ton of bricks: ***"Lead generation isn't just about doing everything—it's about doing the right things in the right order."***

That one sentence flipped a switch in my mind. Up until that point, I'd been chasing every lead-generation tactic under the sun without a plan. I was spreading myself too thin and not giving any one strategy the focus it needed to succeed.

The instructor broke it down: Your lead generation strategy should align with your **mindset, activity level, skills, and budget.** Some tactics require time and hustle, while others need money and precision. The key is to find what works for you, build a system around it, and scale from there.



The Experiment: Building My Lead Generation System

With renewed clarity, I decided to treat lead generation like a science. I started by identifying the strategies that made sense for me:

1. **Social Media**: I realized I was already spending time online, so I leaned into creating consistent, value-driven posts to attract leads.
2. **Referrals**: My sphere of influence became my first priority. I reached out to past clients and personal connections with simple, non-pushy messages.

3. **Events**: Hosting small local events allowed me to meet people face-to-face and build trust.
4. **Paid Ads**: I allocated a modest budget to Facebook ads, focusing on generating leads for specific listings.

I made a simple rule for myself: Focus on **three core strategies** at a time. No more chasing shiny objects. Every month, I reviewed my results, refined my approach, and added new tactics as I mastered the basics.

From Chaos to Consistency

The first month was slow, but I stayed the course. By month two, I started seeing the payoff. My social media posts were getting more engagement. A past client referred me to their sister, who became my next big sale. And my first ad campaign generated three solid leads that I converted into appointments.

Within six months, I had a diversified lead-generation system that was **predictable** and **scalable**. The anxiety I once felt staring at my empty calendar was gone. Instead, I had confidence in my process and peace of mind knowing that my system worked—no matter what was happening in the market.

Success Looks Different for Everyone

What I learned on this journey is that there's no one-size-fits-all formula for lead generation. Your system will depend on your unique strengths, resources, and stage of business. Some people will thrive with high-touch strategies like networking and referrals, while others will crush it with data-driven approaches like paid ads.

The secret isn't just knowing strategies—it's executing them in the right order and refining them as you go. Mastering lead generation is about **progress, not perfection.**

The goal isn't to do everything at once but to build a system that works for you, layer by layer.

Start Building Your System

If you're feeling overwhelmed by the endless ways to generate leads, remember this: Success doesn't come from doing everything—it comes from doing the right things for where you are today. Start with one or two strategies. Test, refine, and expand over time.

Your lead-generation system is the foundation for a business that grows predictably, even in uncertain markets. And once you have it, you'll never stare at an empty calendar again. Let's get to work.

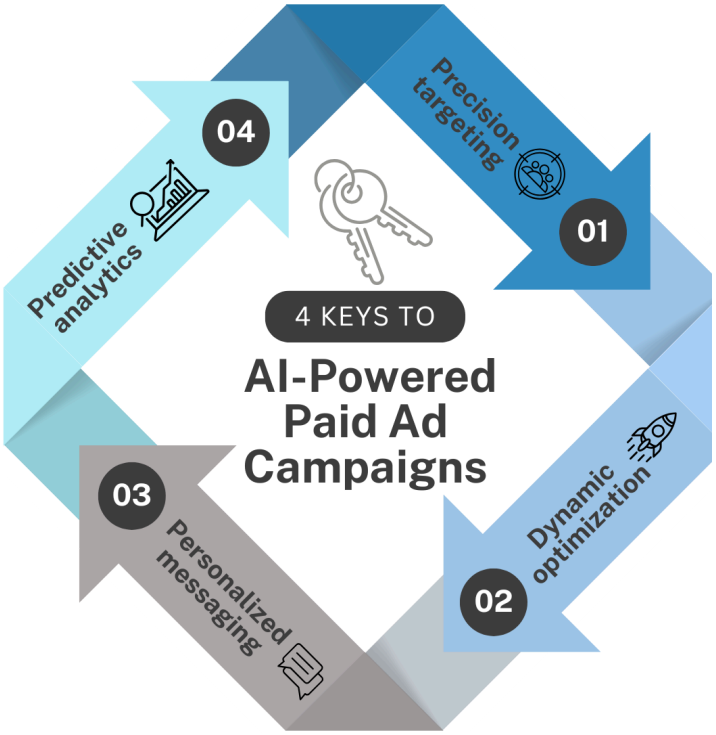
Tactical Breakdown:

The best way to approach lead generation is **in a deliberate order, based on four key elements:**

1. Mindset: You need the right mindset to succeed in lead generation. Rejection is part of the game. Consistency and resilience are what separate high performers from average agents. Start by adopting a **growth mindset**—view every "no" as one step closer to "yes."

Mindset Strategy:

- Focus on **daily habits**, not immediate results.
- Understand that **success comes through consistent effort** and adaptation.



2. Activity Level: Lead generation is a numbers game. At first, you might need to hustle and **put in more effort manually**—cold calling, following up with old leads, and going to networking events. As your business grows, you can shift to more automated or scalable activities, like paid ads.

Activity Breakdown:

- **High-effort channels (Manual):** Cold calling, SOI outreach, networking, and events.
- **Low-effort channels (Automated):** Social media content, email sequences, and paid advertising campaigns.

3. Skills: Mastery over time means refining your sales skills—how you communicate, build relationships, and close deals. Each step of the lead generation journey will push you to sharpen a different set of skills:

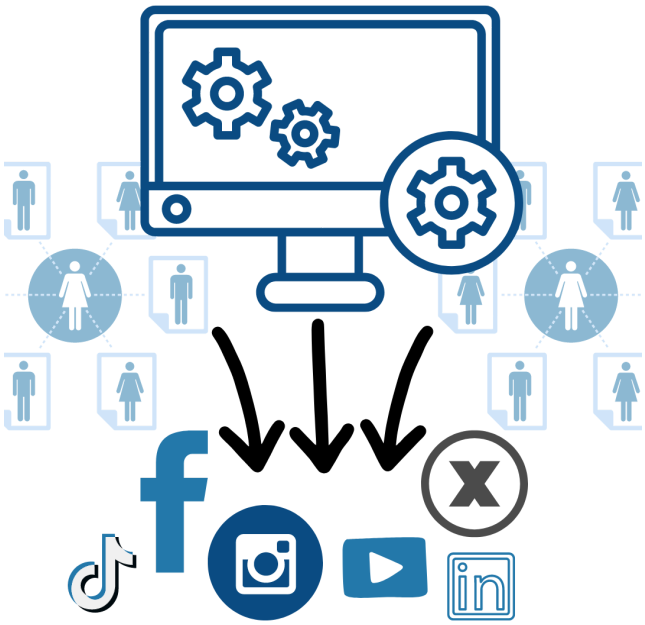
- **Referral lead generation** will improve your ability to build trust and manage relationships.
- **Cold outreach** will teach you how to handle objections and stay persistent.
- **Social media growth** requires storytelling and personal branding skills.

As your skills improve, **you'll convert more leads with less effort**—allowing you to scale your business efficiently.

4. Budget: Not every agent or loan officer starts with a big marketing budget — and that's okay. Some of the most effective lead-generation strategies (like SOI outreach and organic social media) **cost nothing but time and effort**. As your income grows, you can reinvest into scalable strategies like **paid ads and inside sales agents (ISAs)** to build your lead funnel faster.

The Order of Lead Generation Mastery

Here's the **roadmap to mastering lead generation** based on your mindset, activity, skills, and budget:



1. **Start with Sphere of Influence (SOI):** Leverage your personal and professional networks. This requires minimal budget and helps you build early momentum.
    - **Mindset:** Trust that people in your circle want to help you.
    - **Skills:** Relationship-building and follow-up.
    - **Budget:** None.
2. **Focus on Organic Social Media:** Use free platforms like Instagram,

Facebook, and LinkedIn to showcase your expertise and engage your audience.
    - **Mindset:** Be patient—it takes time to build traction.
    - **Skills:** Storytelling and engagement.
    - **Budget:** None.
3. **Add Cold Outreach:**
   Once you're comfortable with conversations, **start reaching out cold** via email, phone, and DMs.
    - **Mindset:** Embrace rejection as part of the process.
    - **Skills:** Objection handling and persistence.
    - **Budget:** Minimal (just your time).
4. **Expand into Events and Vendor Partnerships:**
   Networking events and partnerships with other professionals (like CPAs, attorneys, or contractors) give you access to new audiences.
    - **Mindset:** Commit to being visible and proactive.
    - **Skills:** Networking and relationship management.
    - **Budget:** Low to moderate (event fees or sponsorships).
5. **Scale with Paid Ads:**
   Once you're generating consistent business, reinvest into **paid ads** to amplify your results.
    - **Mindset:** Ads are an investment—not an expense.
    - **Skills:** Marketing and ad optimization.
    - **Budget:** Moderate to high.
6. **Develop Inside Sales Systems (ISAs):**
   As your lead volume increases, **hire ISAs to manage inbound and outbound leads**—allowing you to focus on closing deals.
    - **Mindset:** Delegation helps you scale.
    - **Skills:** Leadership and system-building.
    - **Budget:** High (salaries or commissions for ISAs).

Lead generation is not a one-size-fits-all solution. It's about **layering strategies over time**—starting with low-cost, high-impact channels and scaling as your skills and budget grow. Whether you're a new realtor or loan officer building your first pipeline or a seasoned professional looking to scale, the key is to **focus on the fundamentals** and develop your skills and systems systematically.

Track everything. The best way to improve your lead-generation efforts is to measure results. Whether it's SOI referrals, social media engagement, or paid ad performance, use a CRM to track every touchpoint. You'll quickly see which channels are bringing in the best leads—and where you should double down.

Don't try to do everything at once. Many agents burn out by chasing every lead-generation method at the same time. **Master one strategy first, then add another.** A focused, step-by-step approach will get you better results than spreading yourself too thin.

- REN Success System/ Growth CEO - Resources

1. **Consider the 4 key elements to successful lead generation: mindset, activity level, skills, and budget. Your Sales Goal Calculator could come in handy here if you're looking for metrics.**

2. **Review what campaigns you already have running for your main lead sources and lists: SOI, social media, warm/hot/cold lists, etc.**

3. **If you are MISSING any multichannel marketing campaigns for these leads, use your REN AI Assistant to help you develop content and get them set up using**

the other tools on your REN 360 Dashboard. (Reminder: the other chapters in this playbook break these steps down in MUCH more detail — reread them if need be.)

4. **Use your Sales Goal Calculator to monitor and track your metrics for all of these campaigns.**

Now that you understand the foundation of lead generation, it's time to dive into each strategy. The next chapter will cover your first—and most reliable—lead source: **your Sphere of Influence (SOI).**

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CHAPTER 12

Sphere of Influence Secrets

CHAPTER 12: Sphere of Influence Secrets

Big Idea

Your **Sphere of Influence (SOI)** is the foundation of your lead-generation strategy. These are the people you already know—your friends, family, past clients, acquaintances, and even service providers you interact with regularly. For real estate agents and loan officers, your SOI offers **warm leads with minimal cost or effort**. People in your network are more likely to refer business to you because they know and trust you.

A strong SOI strategy helps you **kickstart your business, build momentum, and generate referrals consistently**. However, it requires a **proactive approach**—you need to stay top-of-mind with your network and ensure they see you as the go-to real estate or loan professional in their circle.

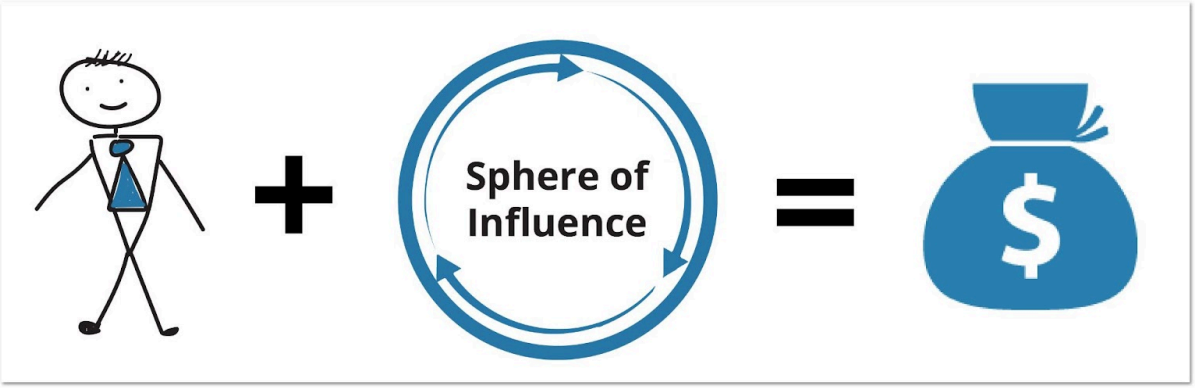
How My Sphere of Influence Became the Foundation of My Business

When I first started in real estate, I thought the only way to get leads was through paid ads and cold calling. I poured money into online campaigns and spent countless hours making uncomfortable calls to strangers. But the results were frustratingly inconsistent.

Leads would trickle in, but they were often cold, unresponsive, and unqualified. I felt like I was working harder than ever, but I wasn't getting anywhere.

That's when a mentor pulled me aside and said, ***"Why are you ignoring the people who already know and trust you?"***

I realized I had been overlooking the easiest, most cost-effective source of leads: **my Sphere of Influence (SOI).** These were the people already in my life—friends, family, past clients, neighbors, and even my barber. I had been so focused on chasing new leads that I hadn't thought about nurturing the relationships I already had.

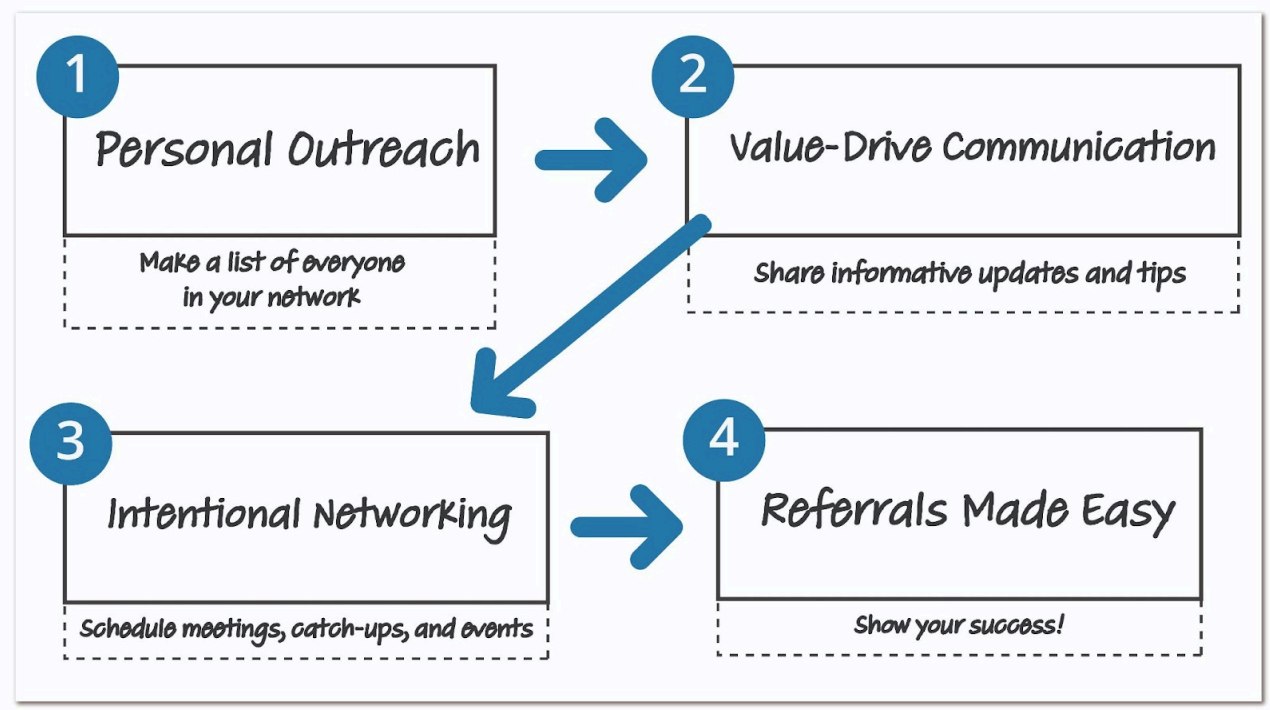


The Turning Point: Building My SOI Strategy

With my mentor's advice, I shifted my focus. Instead of constantly trying to attract strangers, I began reaching out to my SOI. But this wasn't about begging for business—it was about building trust and staying top-of-mind.

Here's what I did:

1. **Personalized Outreach**: I made a list of everyone in my network and started sending handwritten notes, thoughtful texts, and personalized emails.
2. **Value-Driven Communication**: Instead of only talking about real estate, I shared market updates, homeownership tips, and other helpful information they could use—even if they weren't buying or selling.
3. **Intentional Networking**: I scheduled coffee catch-ups, attended community events, and genuinely invested in strengthening relationships.
4. **Referrals Made Easy**: I made sure people in my network knew exactly what I did, how I could help, and how to refer others to me.



The Results: Warm Leads, Real Referrals

The impact of this shift was immediate. People I hadn't spoken to in years started reaching out with questions about buying or selling. A friend referred me to a coworker looking for a loan officer. My neighbor connected me with their cousin who was relocating.

The difference was night and day. These leads were warm, responsive, and ready to work with me. They weren't strangers—they were people who already trusted me because I came recommended by someone they knew.

Within six months, my SOI became the backbone of my business. Referrals flowed consistently, and I no longer had to rely on expensive ads or awkward cold calls. Instead, I spent my time cultivating relationships, knowing they would pay dividends in the long run.

Why Your SOI Matters

Your Sphere of Influence is more than just a list of names—it's the foundation of your lead-generation strategy. These are the people who already trust you, and trust is the most valuable currency in any business. But tapping into your SOI isn't passive—it

requires a proactive approach. You need to stay visible, provide value, and remind people that you're the go-to real estate agent or loan officer in their circle.

The beauty of an SOI strategy is that it grows with time. Every referral you get introduces you to someone new, who then becomes part of your network. It's a compounding effect that creates consistent leads with minimal cost or effort.

Leverage Your SOI Today

If you're struggling with lead generation, take a step back and look at the relationships you already have. Who can you reconnect with? How can you add value to their lives? By investing in your Sphere of Influence, you'll build trust, generate referrals, and create a lead-generation system that scales with you.

Don't ignore the easiest source of leads—lean into your SOI, and watch your business grow.

Tactical Breakdown

Here's how to maximize your SOI for consistent leads:

Step 1: Build Your SOI List

- **Brainstorm**: Write down the names of friends, family members, old coworkers, neighbors, former clients, and anyone else you know personally. Aim for at least 50-100 contacts.
- **Think beyond friends**: Include service providers like your barber, dentist, or accountant—anyone you interact with regularly.
- **Use your phone and social media**: Scroll through your phone contacts, social media connections, and email list for additional names.

Step 2: Segment Your SOI List

- **A-List**: These are close contacts who are likely to refer business to you (e.g., close friends, family, loyal past clients).
- **B-List**: People you know but don't talk too often (e.g., acquaintances, neighbors, or former coworkers).
- **C-List**: Distant connections or contacts who might refer you someday, but need nurturing (e.g., high school classmates or vendors you work with).

Step 3: Consistent Touchpoints

Staying top-of-mind with your SOI requires **regular touchpoints**, but that doesn't mean constantly asking for business. The goal is to **nurture relationships naturally** so they think of you when someone needs real estate or mortgage services.

- **Phone calls or text messages**: Check in, ask how they're doing, and casually mention your work.
- **Handwritten notes**: Send personal thank-you notes after conversations or events.
- **Social media interaction**: Like, comment, and engage with their posts—this keeps you visible without being intrusive.
- **Quarterly updates**: Send a personal message every few months with market updates or holiday greetings.
- **Invitations to events**: Host appreciation events or webinars and invite your SOI contacts.

Step 4: Ask for Referrals (The Right Way)

Directly asking for referrals can feel awkward, but **if done correctly, it's natural and effective**.

- **Make it personal**: Use details related to your client's personal journey and your history together so the ask doesn't sound canned or pushy.
- **Add value first**: Offer market insights, free home valuations, or helpful tips when you reach out.
- **Keep it casual**: You don't need to pressure anyone. Simply let them know you appreciate any referrals.

Step 5: Track and Reward Referrals

- **Use a CRM** to log every conversation with your SOI. Track who sends referrals and follow up to **thank them personally.**
- **Offer small rewards**: A handwritten note or small gift card goes a long way in showing gratitude.
- **Create a referral program**: Offer an incentive for referrals, like a drawing for a prize or a VIP client appreciation event.

SUMMARY

Your SOI is your most valuable and **cost-effective lead source**. These contacts trust you and want to help—**but they need to know you're in the business and that you appreciate referrals**. Consistent, authentic communication with your SOI will keep you top-of-mind, resulting in steady referrals and warm leads over time.

- **Big Idea:** Start with people you know and nurture those relationships.
- **Tactical Breakdown:** Build your SOI list, segment it, stay in touch, and ask for referrals. Track your efforts and reward those who refer you.

PRO TIP

Use video messages. Instead of just texting or calling, send **short personalized video messages** to your SOI. It adds a personal touch, is more memorable, and increases the chance they'll respond. Something like, "Hey [Name], just checking in! Hope all is well—by the way, if you hear of anyone looking to buy or sell, I'd love to help them. Let's catch up soon!"

WARNING

Don’t take your SOI for granted. Just because someone knows you doesn’t mean they’ll automatically send you referrals. **If you’re not consistent in nurturing your relationships and communicating your services, they may forget about you.** Also, avoid over-asking—balance your requests with genuine connection.

- **People** - Hire someone to help you get your list organized if you're not going to do it on your own. It needs to be prioritized in your crm and separated from your other lists by lead source.
- **Process -** In your timeblocks you should have at least 2 time blocks a week to be following up with this part of your list and the script you feel good about.
- **Tools** - Go to the timeblock worksheet so see how this fits in your schedule and download the timeblock playbook
- REN Success System/ Growth CEO - Resources

1. **Build your SOI list REN CRM 2.0. Segment this list intwo A, B, and C lists based on how likely they are to refer new business.**

2. **Use REN AI Assistant, REN Social Sphere, and REN Direct Mail to nurture these lists with regular email, text, phone, and mail campaigns.**

3. **Use your Sales & Marketing Tracker to track your outreach and follow-ups (can be accessed from the Dashboard > Database Pro Resources).**

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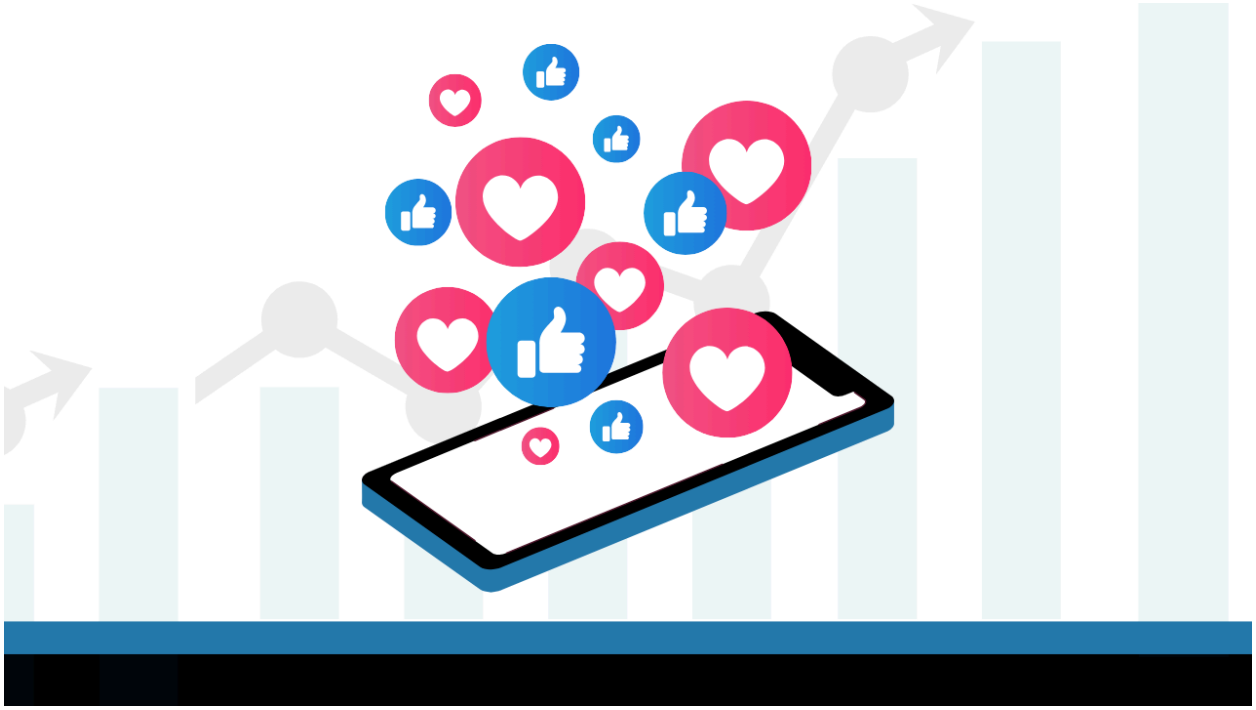
CHAPTER 13

Organic & Social Media

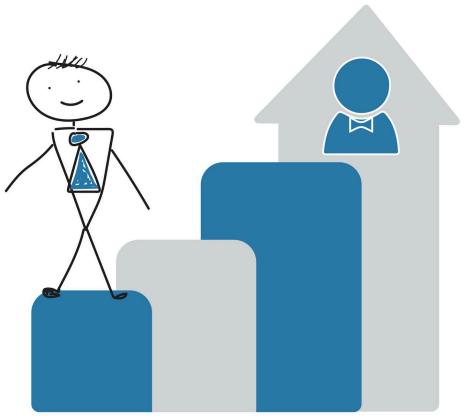
CHAPTER 13: Organic & Social Media



Big Idea

Social media has revolutionized how real estate agents and loan officers connect with potential clients. **Organic social media growth** refers to building your audience, influence, and leads without paying for ads. Platforms like Instagram, Facebook, LinkedIn, and TikTok allow you to share valuable content, engage with your audience, and position yourself as an expert in your field—**all without spending a dime.**

For real estate agents and loan officers, **social media is not just for likes and follows—it's a relationship-building tool**. When used strategically, it can generate inbound leads, nurture referrals, and build trust with prospects long before they're ready to buy or sell. Success in organic social media comes from consistency, authenticity, and providing value—not flashy posts or viral trends.



Story

Emily, a loan officer, was skeptical about social media at first. She thought it was just for influencers and didn't see how posting pictures would

generate business. But one day, she posted a short video explaining how first-time homebuyers could improve their credit scores. Within hours, a friend commented: **"I had no idea you could help with that! Can we talk?"**

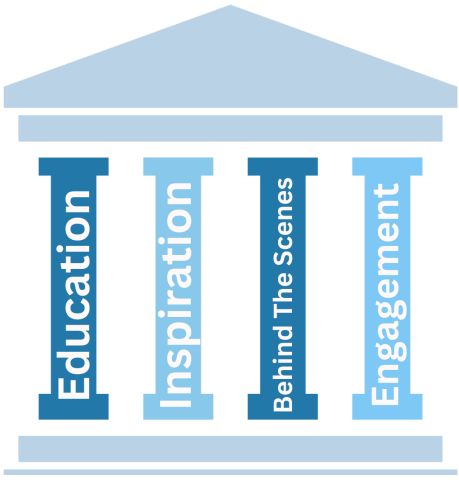
Encouraged, Emily began sharing tips weekly and interacting with her audience through stories and comments. Soon, her inbox was filled with questions from people interested in buying homes or refinancing loans. Her takeaway? **You don't need to go viral; you just need to stay visible** and provide useful content that speaks directly to your audience's needs.

Tactical Breakdown

Step 1: Choose the Right Platforms

- **Facebook**: Ideal for **community-building** through groups and events. You can also connect with local prospects via neighborhood groups.
- **Instagram**: Great for visual content and building a personal brand. Stories, posts, and reels are perfect for showcasing properties or sharing behind-the-scenes moments.
- **LinkedIn**: Best for **professional networking** and connecting with referral partners (like CPAs, financial advisors, and other realtors).
- **TikTok**: A growing platform for younger buyers. If you're comfortable with video content, TikTok is great for **quick tips and educational videos**.

Pro Tip: Start with **one or two platforms** to avoid overwhelm. It's better to be consistent on one platform than spread yourself thin across many.



Step 2: Create Valuable Content (Content Pillars)

Your content should be both **informative and engaging**. Use **content pillars**—themes that resonate with your audience and position you as an expert.

- **Education**: Explain the home-buying process, loan programs, market updates, and how-to tips.
    - Example: "5 Things Every First-Time Homebuyer Should Know"

- **Inspiration**: Share stories of clients finding their dream homes or paying off their mortgages.
    - Example: "Meet Sarah: She Thought She'd Never Qualify for a Loan—But We Got It Done!"
- **Behind the Scenes**: Show the day-to-day life of a realtor or loan officer.
    - Example: “Here’s what a typical closing day looks like!”
- **Engagement**: Ask questions, run polls, and share personal stories to spark conversations.
    - Example: “What’s your dream neighborhood? Let’s hear it!”

Pro Tip: Video content performs best. **Use Instagram Reels, Facebook Stories, or LinkedIn videos** to grab attention quickly. Keep them short, relevant, and fun!

Step 3: Engage with Your Audience

Organic social media is all about **two-way communication**. It’s not just about posting—you need to actively engage with your audience to build relationships.

- **Comment and reply**: Respond to every comment and direct message promptly.
- **Interact with followers**: Like and comment on their posts. This keeps you top-of-mind without being salesy.
- **Use stories and polls**: Instagram and Facebook stories let you engage in real-time through questions, polls, and quizzes.
- **Host live sessions**: Go live to answer questions, give market updates, or provide homebuyer tips.

Step 4: Be Consistent with Posting

Success on social media requires **regular, consistent posting**. You don’t need to post every day, but 3-5 times a week ensures you stay visible to your audience.

- **Plan content in advance**: Use a content calendar to schedule your posts ahead of time.
- **Batch-create content**: Record videos, take photos, or write posts in batches to save time.
- **Stick to your themes**: Rotate between education, inspiration, and personal content to keep things fresh.

Step 5: Leverage Social Proof

People trust what others say about you more than what you say about yourself. Social media is a great way to **showcase testimonials, client success stories, and referrals**.

- **Share client testimonials**: Ask happy clients to post a review and tag you.
- **Use "Just Sold" and "Under Contract" posts**: Celebrate milestones to show your audience that you're actively closing deals.
- **Highlight client wins**: Share small wins, like helping a buyer improve their credit or locking in a great mortgage rate.

Google LSA Lead Generation: A Step-by-Step Guide

Google Local Services Ads (LSA) offer a powerful way for local businesses to generate leads by appearing at the top of relevant Google searches. Here's a step-by-step process to leverage LSA effectively:

Step 1: Eligibility and Qualification

- **Check Eligibility:** Ensure your business falls within the currently supported categories like plumbing, cleaning, locksmiths, etc.
- **Background Checks:** Google requires background checks and licensing verification for specific categories.

Step 2: Setting Up Your LSA Campaign

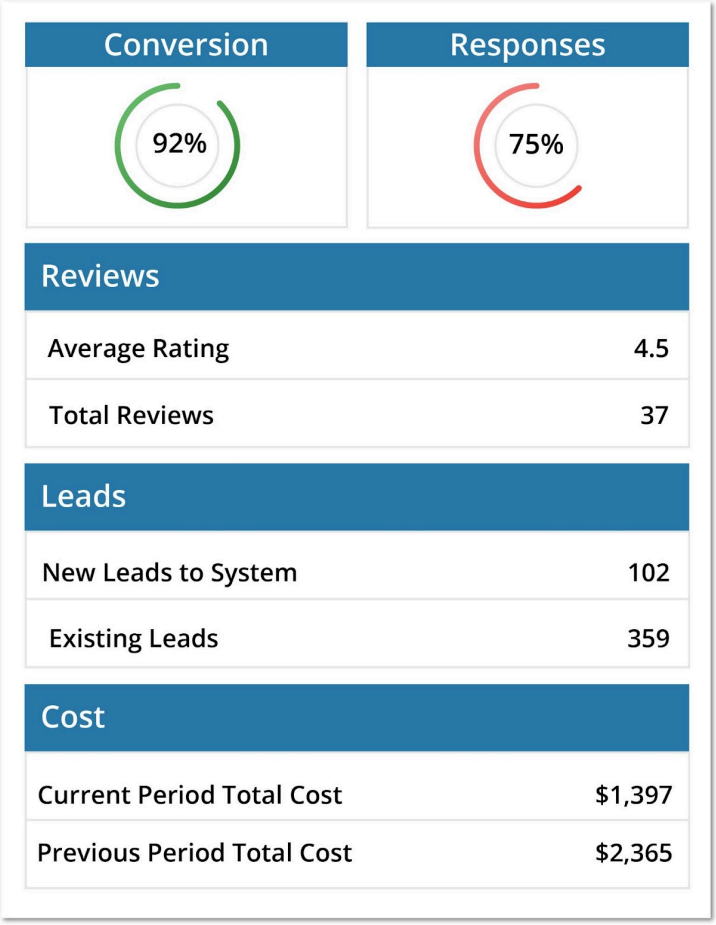
1. **Create a Google My Business Profile:** Claim and optimize your Google My Business listing for accurate information and positive reviews.
2. **Sign Up for Google Local Services:** Visit the Google LSA website and initiate the sign-up process.
3. **Choose Your Service Area:** Define the geographic region where you want your ads to appear.
4. **Select Your Services:** Choose the specific services you offer that you want to advertise.
5. **Set Your Budget:** Determine your desired budget for lead acquisition based on your goals and industry benchmarks.
6. **Manage Your Profile:** Provide detailed information about your business, including qualifications, awards, and customer testimonials.

Step 3: Lead Management and Conversion

- **Responding to Leads:** Promptly respond to all incoming phone calls and messages through the LSA platform.
- **Lead Conversion Tracking:** Monitor your lead conversion rate to assess the effectiveness of your campaign and optimize your budget allocation.
- **Booking Management:** Utilize the LSA platform to manage appointments and track booking confirmations.

Additional Tips:

- **Maintain a High Google Guarantee Score:** Google prioritizes businesses with high scores based on factors like background checks, licensing, customer reviews, and responsiveness.
- **Optimize Your Profile:** Continuously update your profile with relevant keywords, high-quality photos, and service descriptions.
- **Track and Analyze Performance:** Monitor key metrics like impressions, click-through rates, lead volume, and conversion rates to refine your campaign strategy.
- **Consider Additional Tools:** Utilize tools like Google Keyword Planner to identify relevant keywords and estimate potential search volume.



Helpful Tools for Google LSA:

- **Google My Business:** https://www.google.com/business/
- **Google Local Services Website:** https://ads.google.com/intl/en_us/home/local-services-ads/
- **Google Keyword Planner:** https://ads.google.com/home/tools/keyword-planner/
- **Third-Party LSA Management Tools:** Several companies offer LSA management tools with additional features like automated bidding, competitor analysis, and reporting.

By following these steps and continuously optimizing your campaign, Google LSA can be a valuable tool for generating qualified leads and driving business growth for local service providers. Remember, maintaining a strong Google Guarantee score, responsive lead management, and ongoing profile optimization are crucial for success.

Using Google My Business (GMB) for Lead Generation: A Step-by-Step Guide with AI Tools

Google My Business (GMB) offers a powerful platform for local businesses to attract leads and convert them into customers. Here's a step-by-step process to leverage GMB for lead generation, incorporating AI tools for optimization:

1. Claim and Optimize Your GMB Listing:

- **Claim Your Listing:** If you haven't already, claim your GMB listing and verify ownership through Google.
- **Accurate NAP:** Ensure your Name, Address, and Phone Number (NAP) are consistent across all online platforms.
- **Category Selection:** Choose the most relevant primary and secondary categories that accurately reflect your business.
- **Description:** Craft a compelling and informative business description highlighting your services, target audience, and unique selling points.
- **Keywords:** Optimize your description and title with relevant keywords to improve search visibility.

2. Enhance Your GMB Profile:

- **High-Quality Photos:** Showcase your business with professional and engaging photos of your storefront, team, and products/services.
- **Posts and Updates:** Regularly share updates, promotions, events, and blog posts to keep your profile active and attract potential customers.
- **Google Posts:** Utilize Google Posts to share short, targeted updates that appear directly in search results.

- **Questions & Answers:** Encourage user engagement by answering questions promptly and thoroughly.

3. Generate Reviews and Respond Strategically:

- **Request Reviews:** Encourage satisfied customers to leave positive reviews on your GMB profile.
- **Respond to All Reviews:** Respond to both positive and negative reviews promptly and professionally.
- **Sentiment Analysis Tools:** Utilize AI-powered sentiment analysis tools (e.g., MonkeyLearn, MeaningCloud) to understand the overall sentiment of reviews and identify areas for improvement.

4. Utilize Lead Generation Features:

- **Messaging:** Enable messaging on your GMB profile to allow potential customers to contact you directly.
- **Website Link:** Ensure your website link is prominently displayed for easy access to your contact information and lead capture forms.
- **Google My Business Insights:** Analyze GMB insights to track website clicks, calls, and other valuable metrics to understand how users interact with your profile.

5. AI Tools for Optimization:

- **SEO Optimization Tools:** Utilize AI-powered SEO tools like Surfer SEO or SEMrush to optimize your GMB profile for relevant keywords and improve search ranking.
- **Social Media Management Tools:** Manage your GMB posts and social media presence efficiently with tools like Hootsuite or Buffer.
- **Review Management Tools:** Automate review request workflows and track sentiment with tools like ReviewTrackers or Birdeye.

Additional Tips:

- **Post Consistently:** Maintain a regular posting schedule to keep your profile fresh and engage your audience.
- **Local Events:** Participate in local events and showcase your involvement through GMB posts.
- **Run Local Ads:** Consider running targeted Google Ads campaigns based on your GMB profile to reach a wider audience.

- **Track and Analyze:** Regularly monitor your GMB performance and adapt your strategy based on insights gained from analytics and user engagement.

By following these steps and leveraging AI tools, you can transform your GMB profile into a powerful lead generation machine. Remember, building a strong online presence takes time and consistent effort, but the long-term benefits of a well-optimized GMB listing can significantly boost your local business growth.

Organic social media is a **powerful, low-cost way** to generate leads and build trust with your audience. The key to success is **consistency, engagement, and providing value** through your content. By using the right platforms, sharing educational and engaging posts, and interacting with your followers, you'll position yourself as the go-to agent or loan officer in your network.

Repurpose content across platforms. If you post a helpful tip on Instagram, reuse it on Facebook, LinkedIn, or even your email newsletter. This saves time and ensures your message reaches a wider audience.

Don't focus too much on vanity metrics like likes or followers. It's better to have 300 engaged followers who refer business to you than 10,000 followers who never engage. **Quality leads come from relationships, not follower counts.**

- **People:** Consider hiring someone to help you manage your account. You can have a virtual assistant help you and just have them follow the training we provide.
- **Process:** We have a step by step check list set up for each organic and social media platform you need help optimizing and generating leads from.
- **Tools:** Go to the REN Marketplace and or AI tools sheet and check out tools to make this easier to execute on.
- REN Success System/ Growth CEO - Resources

1. **Pick two social media platforms to focus on initially (we recommend Instagram and Facebook to start out).**

2. **Use REN AI Assistant to create a content calendar for the next 30 days. This will include social posts, graphics, stories, and videos — anything that will help you engage with your audience consistently.**

3. **Use REN Social Sphere to schedule your posts ahead of time.**

4. **Keep track of your daily posts with your Sales & Marketing Tracker (it can be accessed from the REN Dashboard under Database Pro Resources).**

Organic social media growth is about **building relationships and trust over time**. With the right strategy, you'll turn followers into clients and referral partners without spending a fortune. Next, we'll dive into **how to use paid ads** to accelerate your lead generation even further!

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CHAPTER 14

Paid Ads Secrets

CHAPTER 14: Paid Ad Secrets

Big Idea

Paid ads give real estate agents and loan officers the ability to **reach a larger, highly targeted audience quickly**. Unlike organic social media strategies, paid advertising allows you to generate leads at scale by placing your message in front of people who might not know you yet but are actively searching for services or interested in buying, selling, or refinancing. Platforms like **Facebook, Instagram, Google, and LinkedIn** allow precise targeting based on location, behavior, and intent.

However, **running effective ads isn't just about spending money—it's about strategy, testing, and optimization**. The beauty of paid ads is the ability to **automate lead flow**, but the danger lies in wasting money on poorly executed campaigns. This chapter will teach you how to use paid ads to accelerate your growth without breaking the bank.

Story

John, one of our clients, a seasoned real estate agent, noticed that his referral pipeline had slowed down. Instead of waiting for referrals, he decided to try Facebook ads. He created a campaign offering a **free home valuation report** and spent $200 on ads over a week. To his surprise, he generated 15 leads—several of whom were interested in selling within the next few months.

However, John also learned that **not every lead converts right away**. Out of those 15 leads, only 2 were ready to move forward immediately. But by **following up with the others consistently**, John closed an additional two deals over the next six months. His experience showed that **paid ads can quickly generate new leads, but success depends on strong follow-up and patience**.

Tactical Breakdown

Step 1: Choose the Right Platform

Different platforms offer unique advantages depending on the type of audience you want to reach:

- **Facebook and Instagram Ads**: Great for real estate agents. These platforms allow **targeting based on location, age, interests, and behaviors**. Use this for listing promotions, lead magnets (like free home valuations), or open house invites.
- **Google Ads**: Ideal for loan officers and agents targeting high-intent prospects. **Search ads** reach people actively searching for terms like “mortgage broker near me” or “homes for sale in [City].”
- **LinkedIn Ads**: Best for **networking with referral partners** (like realtors targeting lenders or lenders targeting financial planners).
- **YouTube Ads**: Great for **educational video content** targeting buyers and sellers researching the home-buying process.

Pro Tip: If you’re just starting, focus on **Facebook/Instagram or Google Ads**—they offer the best combination of reach and affordability for real estate and mortgage professionals.

Step 2: Create an Irresistible Offer

Paid ads work best when they **offer value upfront**. Your goal is to attract leads by offering something they can't resist.

Examples of Effective Offers:

- **Free home valuation report**: "Curious what your home is worth in today's market? Click here for a free home valuation!"
- **First-time buyer checklist**: "Download your free guide to buying a home in [City]!"
- **Open house invitation**: "Join us this Saturday for a tour of this beautiful property!"
- **Refinance consultation**: "See how much you could save by refinancing—schedule your free consultation today!"

Step 3: Build a Simple Funnel

A funnel is the path you take a prospect through—from **clicking your ad to becoming a lead**. Even the best ads won't work without a well-optimized funnel.

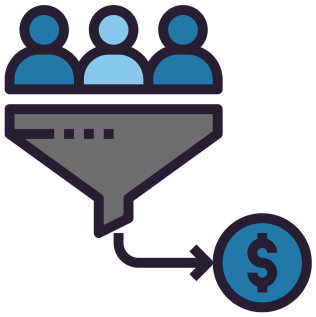
Here's a basic funnel structure for realtors and loan officers:

1. **Ad**: Eye-catching ad with a clear call-to-action (e.g., "Get a Free Home Valuation").
2. **Landing Page**: A page where visitors enter their contact information in exchange for your offer.
3. **Thank You Page**: A confirmation page that assures the lead their information was received. This page can also prompt them to schedule a call or follow you on social media.
4. **Automated Follow-Up**: Use email or text sequences to nurture leads until they're ready to take the next step.

Step 4: Target the Right Audience

Paid ads let you **choose exactly who sees your message**. The key to success is narrowing your targeting to the people most likely to become clients.

- **Facebook/Instagram Audience**: Target users based on **location, income level, homeownership status**, and interests (like Zillow, Redfin, or mortgage calculators).
- **Google Ads**: Use keywords related to **buying, selling, refinancing**, or local real estate.
- **Retargeting Ads**: Use retargeting to **show ads to people who visited your website or landing page** but didn't convert. This increases your chances of closing the deal with warm prospects.



Pro Tip: Start with **geo-targeting**—focus your ads within your city or target neighborhoods to keep your ad spend efficient.

Step 5: Test, Optimize, and Scale

Running ads isn't a "set it and forget it" process. **Testing different ad creatives, headlines, and targeting options** will help you find what works best.

- **A/B Testing**: Run multiple versions of the same ad (with slight differences in headlines or images) to see which performs best.
- **Monitor KPIs**: Track metrics like **click-through rate (CTR), cost-per-click (CPC), and conversion rate**.
- **Optimize Campaigns**: Pause low-performing ads and double down on ads that generate leads at a low cost.
- **Scale Up**: Once you've found a winning ad, gradually increase your budget to scale your lead flow.

SUMMARY

Paid ads allow realtors and loan officers to **reach more prospects quickly** and **generate leads at scale**. Whether you're promoting a home valuation, an open house, or a refinance consultation, the key to success lies in **creating irresistible offers and using optimized funnels** to convert clicks into leads. With the right targeting, testing, and follow-up processes in place, paid ads can become a **reliable and scalable part of your lead-generation strategy**.

PRO TIP

Use retargeting ads. Most leads don't convert on the first interaction. Retargeting allows you to **re-engage with prospects who clicked on your ad but didn't submit their information**, giving you a second (or third) chance to close the deal.

Don't set your ads and forget them. Many agents waste money by letting underperforming ads run without adjustments. **Check your campaign metrics weekly** and make changes as needed to keep your cost per lead under control.

- **REN Success System/ Growth CEO - Resources**

1. **Choose one platform to start: Facebook/Instagram for discovery, Google for high intent, or LinkedIn for partnerships.**
2. **Use REN AI Assistant to develop an irresistible offer that will set you apart from your competition.**
3. **Use REN CRM 2.0 to build a simple landing page funnel to collect contact information.**
4. **Use REN Paid Ads to create ad content and graphics designed to push leads toward your landing page.**

5. **Track your metrics using the Sales & Marketing Tracker. You want to keep an eye on what's working and consistently make changes to what isn't.**

6. **Use REN CRM 2.0 to set up automated follow-up campaigns for leads that raise their hand and express interest in your offer.**

Paid ads are a **powerful tool for scaling your business**, but they require strategy, patience, and follow-through. With the right offer, funnel, and targeting, you'll generate a steady stream of new leads. In the next chapter, we'll explore **how to leverage cold outreach** to proactively connect with new prospects.

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CHAPTER 15

Cold Outreach

CHAPTER 15: Cold Outreach

Big Idea

Cold outreach is a proactive strategy where you **initiate contact with people who aren't expecting to hear from you**—through phone calls, emails, text messages, or direct messages on social media. For real estate agents and loan officers, cold outreach provides a way to fill your pipeline with prospects you wouldn't reach through referrals, organic social media, or ads. While rejection is part of the process, cold outreach allows you to generate opportunities on demand by putting yourself in control of your lead flow.

The key to success isn't just about volume—it's about persistence, personalization, and follow-up. Cold outreach is a skill, and when done correctly, it can lead to valuable relationships, referrals, and deals. It's not about closing a deal on the first call but starting conversations that could lead to future business.

Story

Randy, one of our clients, a loan officer, was new to the industry and didn't have a large referral network yet. He decided to start **cold-calling renters** from a list he bought online, offering free consultations on home loans. The first day was rough—he made 50 calls and got 48 rejections. But on call 49, he reached a young couple who had been thinking about buying a home but didn't know where to start. **By the end of the month, Carlos closed his first deal from cold outreach.**

Randy learned an important lesson: **Cold outreach is a numbers game**, and success lies in persistence. Not every lead will say yes right away, but every "no" brings you closer to a "yes." With each call, Randy improved his scripts, became more comfortable handling objections, and learned the value of consistent follow-up.

Tactical Breakdown

Step 1: Build a Target List

Cold outreach works best when you **target the right audience**. Random cold-calling wastes time, so be intentional about who you reach out to.

- **For Real Estate Agents:**
    - Renters in your area (who may be ready to buy).
    - FSBO (For Sale By Owner) listings—these sellers might need help selling.
    - Expired listings—homeowners who didn't sell and might still need an agent.
    - Investors who buy or sell properties regularly.
- **For Loan Officers:**
    - Renters interested in transitioning to homeownership.
    - Homeowners who might benefit from refinancing.
    - Real estate agents—pitch your services to become their preferred lender.

Step 2: Create Personalized Scripts

The success of cold outreach depends on **making your conversations personal and relevant**. Instead of launching into a hard sell, focus on starting a conversation.

Sample Cold-Call Script for Real Estate Agents:
"Hi [Name], I noticed that your listing recently expired. I'm [Your Name], a local agent in [City]. I specialize in helping homeowners sell quickly and at top dollar. Have you thought about re-listing your property soon?"

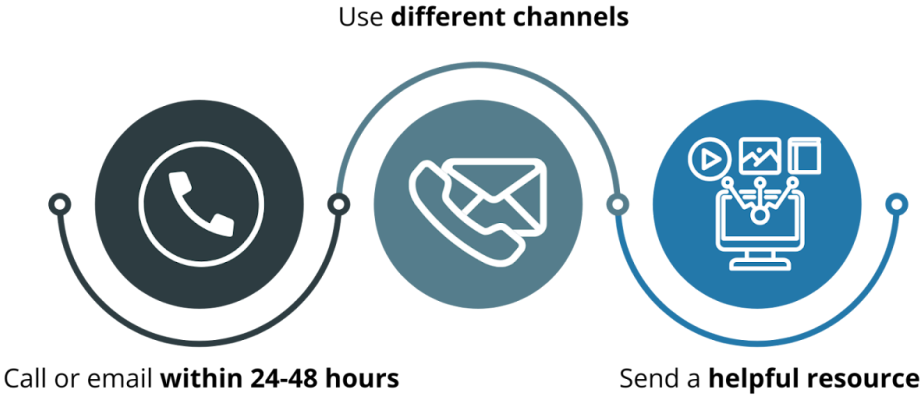
Sample Cold Outreach Email for Loan Officers:
"Hi [Name], I'm [Your Name], a loan officer with [Company]. I noticed that interest rates have dropped recently, and I'd love to help you explore how refinancing could lower your monthly payments. Would you have 15 minutes to chat this week?"

Pro Tip:
Use **their first name** and mention **something specific** about their situation (like an expired listing or current interest rates) to make your outreach more personal.

Step 3: Track and Follow Up

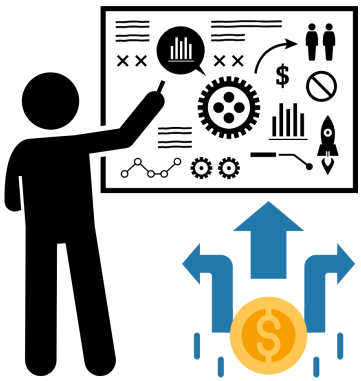
The fortune is in the follow-up. **Most people don't respond to the first call or email**—it usually takes multiple touchpoints to get a reply.

- **Best Practices for Follow-Up:**
    - Call or email **within 24-48 hours** if you don't hear back.
    - Use **different channels**: If you called the first time, send a follow-up email or text.
    - Send **a helpful resource** (like a market update or a homebuyer checklist) in follow-ups to provide value without being pushy.



Pro Tip: Use a **CRM system** to log your outreach activity and set reminders for follow-ups. This ensures you stay organized and don't lose track of leads.

Step 4: Overcome Common Objections



Rejection is inevitable, but with the right preparation, you can **handle objections gracefully** and turn a "no" into a "maybe."

Common Objections and Responses for Real Estate Agents:

- **"I'm not ready to sell right now."**
  - "I completely understand. When do you think there might be a better time? I'd love to stay in touch and share market updates."
- **"I'm trying to sell it myself."**
  - "That's great! If you ever want a second opinion or need help with paperwork, I'd be happy to assist. No strings attached."

Common Objections and Responses for Loan Officers:

- **"I'm happy with my current mortgage rate."**
  - "That's awesome! Out of curiosity, have you looked into any new programs? Some recent changes might offer even better savings."
- **"I don't have time right now."**
  - "I hear you—things get busy! How about I send you a quick breakdown of potential savings, and we can connect next week if you're interested?"

Step 5: Stay Consistent

Cold outreach requires **consistency and volume**. The goal is to **make outreach part of your daily routine**—not just something you do occasionally.

- **Set a daily outreach goal**: Aim for 10-20 calls, emails, or texts per day.
- **Track your metrics**: Measure how many contacts it takes to get a conversation and how many conversations lead to appointments.

- **Celebrate small wins**: Every conversation, even if it doesn't convert, is a step toward building confidence and refining your process.

Cold outreach is one of the most **effective ways to generate new business on demand**, especially when you're just starting or trying to fill a slow pipeline. It puts you in control of your lead flow and teaches valuable skills like persistence, objection handling, and follow-up. The key is to target the right audience, personalize your outreach, and stay consistent—because every "no" brings you closer to a "yes."

Use multi-channel outreach. Don't rely on just one method. **Combine phone calls, emails, texts, and DMs** on platforms like LinkedIn or Instagram to increase your chances of getting a response.

Don't take rejection personally. Cold outreach isn't about you—it's about timing. Most people won't respond right away, and that's okay. **Stay professional and persistent**, and remember that even a "no" today could become a "yes" later if you follow up.

- REN Success System/ Growth CEO - Resources

ACTION STEPS

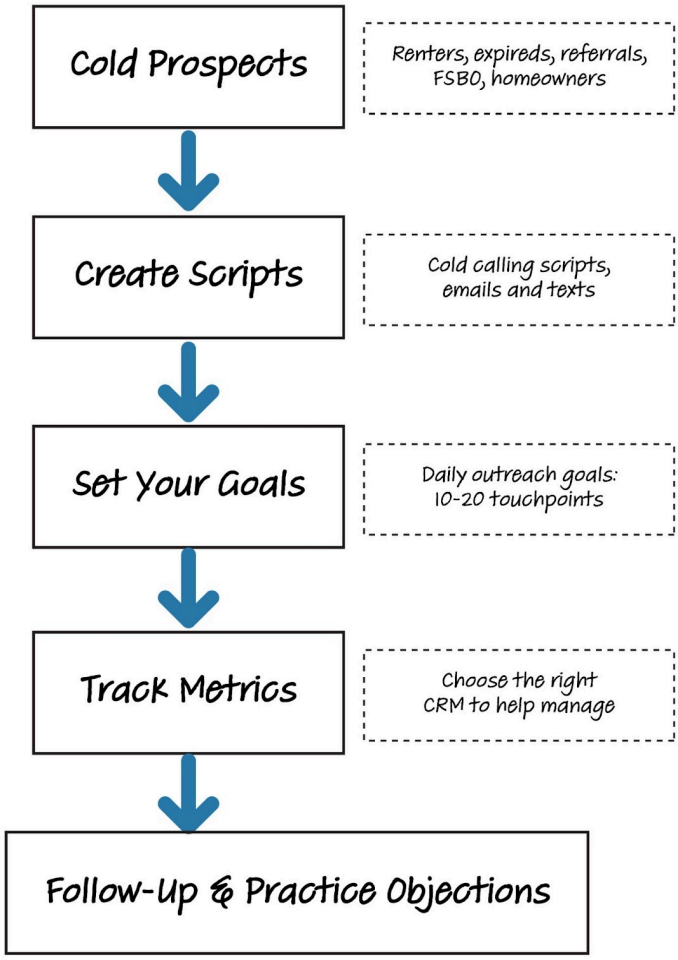
1. **Use REN CRM 2.0 to create and segment a list of 50-100 cold prospects (renters, expired listings, FSBOs, homeowners, or referral partners, etc).**

2. **Use REN AI Assistant to develop personalized scripts for your cold calls, emails, and texts.**

3. **Use REN CRM 2.0 to schedule automated email and text outreaches.**

   ****IMPORTANT** Do NOT call or text anyone that hasn't given you explicit permission to reach out to them.**

4. **Depending on what level of service you have, use REN AI Voice & AI Text to have your AI Sales Agent follow-up with cold leads.**



5. **Use your Sales & Marketing Tracker to track your outreach and follow-ups (can be accessed on your REN Dashboard in the Database Pro Resources tile).**

Cold outreach isn't about luck—it's about **skill and persistence**. With the right strategy and a consistent approach, you can turn cold contacts into warm relationships and close deals you never thought possible. In the next chapter, we'll explore **how to leverage events to build relationships and generate new leads.**

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CHAPTER 16

Event Marketing Secrets

CHAPTER 16: Event Marketing Secrets

Big Idea

Events offer a powerful way for real estate agents and loan officers to **generate leads by building meaningful, face-to-face connections.** Whether it's a first-time homebuyer seminar, an open house, a networking mixer, or a client appreciation event, hosting or attending events helps you establish trust, showcase your expertise, and expand your network.

People are more likely to work with someone they've met in person or engaged with directly. Events allow you to create lasting impressions and open the door for future conversations. The goal isn't to close deals on the spot but to start relationships that will convert into business over time.

Story

Sandra, a real estate agent, was struggling to stand out in a competitive market. She decided to host a **first-time homebuyer workshop** at a local coffee shop. She promoted the event on Facebook and invited her Sphere of Influence (SOI) to spread the word.

The turnout was small—only eight people showed up. But Sandra didn't see it as a failure. During the workshop, she shared helpful tips, answered questions, and collected contact information from every attendee. **Two attendees became clients within the next three months**, and several others referred her to friends.

Sandra learned that **the success of events isn't always about size—it's about meaningful conversations and follow-ups. Every time she held the event, it got bigger, and bigger, turning into over 100+ people showing up to her events every 3 months or so.** One small event helped her build lasting relationships that generated business months after the event ended.

Tactical Breakdown

Step 1: Choose the Right Type of Event

The type of event you host should align with your goals and audience. Here are some popular event ideas for realtors and loan officers:

- **For Real Estate Agents:**
  - **Open Houses:** Showcase a property and invite neighbors, prospective buyers, and agents.
  - **First-Time Homebuyer Workshops:** Educate attendees on the buying process.
  - **Client Appreciation Events:** Host a casual get-together for past clients to stay top-of-mind.
- **For Loan Officers:**
  - **Home Buying Seminars with Realtors:** Partner with agents to educate buyers about financing.
  - **Refinance Workshops:** Help homeowners explore refinancing options.
  - **Networking Events:** Connect with realtors and other referral partners.

Pro Tip: Co-host events with vendors or referral partners (like title companies or financial advisors). This helps **split costs** and **expand your audience.**

Step 2: Promote Your Event Effectively

The success of your event depends on **getting the right people in the room.** Use multiple channels to promote it and build excitement.

- **Social Media Promotion:** Create an event on Facebook or Eventbrite and share it across your platforms.
- **Email Invitations:** Send personal invites to your SOI, past clients, and prospects.
- **Flyers in Local Businesses:** Leave event flyers at coffee shops, gyms, or community centers.
- **Partner Promotion:** If you're co-hosting, ask your partner to invite their network as well.

Pro Tip: Offer an incentive for attending, such as free coffee, a raffle, or a small gift (e.g., gift cards or home improvement tools). People are more likely to show up when they get something in return.

Step 3: Make a Lasting Impression

At the event, **focus on creating genuine connections, not hard selling.** Be approachable, listen to attendees' needs, and share helpful information.

- **Prepare a short presentation** if it's a workshop or seminar. Use slides or handouts to educate attendees.
- **Use a sign-in sheet** to collect contact information for future follow-ups.
- **Engage attendees in conversation**: Ask them questions about their goals (buying, selling, refinancing, etc.).
- **Be visible**: If it's an open house, greet every attendee and offer a quick property tour.

Pro Tip: Use **icebreaker activities** to make attendees feel comfortable. For example, ask them to share what kind of property they'd love to buy or their biggest concern about getting a mortgage.

Step 4: Follow Up with Attendees

The real power of events lies in **the follow-up.** You've made great connections—now it's time to **nurture those relationships** and turn them into leads.

- **Send a thank-you message** within 24 hours of the event. Personalize it by referencing a specific conversation you had.
    - Example: “Hi [Name], it was great chatting with you at the homebuyer workshop. If you have any other questions, feel free to reach out. I’d love to help with your next steps!”
- **Offer additional value:** Send them a helpful resource related to the event, such as a guide or market report.
- **Add them to your CRM:** Track their interest level and set reminders to follow up again in a few weeks.
- **Invite them to future events**: If they didn’t convert right away, invite them to your next event to keep the relationship going.

Step 5: Measure Success and Improve

Evaluate how well the event performed so you can improve future events.

- **Key Metrics to Track:**
    - Number of attendees
    - Number of follow-ups completed
    - Number of appointments or consultations booked
    - Deals closed from event contacts
- **Gather Feedback:** Ask attendees for feedback to see what they enjoyed and how you can improve.

Pro Tip: Don’t be discouraged by a small turnout. **Focus on the quality of interactions, not quantity.** Even a handful of meaningful conversations can lead to valuable business down the road.

Events are a relationship-building tool that allows real estate agents and loan officers to connect with potential clients and referral partners in a personal, engaging way. Whether it’s an open house, workshop, or networking event, success lies in creating meaningful conversations and following up consistently. Don’t focus on how many people attend—focus on building relationships that convert over time.

Create urgency with limited availability. For example, say, “Only 10 spots available for the homebuyer workshop.” This makes people feel like they need to act fast to secure a spot, increasing attendance.

Don’t wait too long to follow up. If you wait more than 48 hours to reach out, attendees may forget about you or lose interest. **The sooner you follow up, the better your chances of converting leads.**

- REN Success System/ Growth CEO - Resources

1. **Choose an event type. It should align with your goals and audience.**

2. **Use REN AI Assistant to help you develop a multichannel marketing promotional schedule. It should include emails, texts, social posts, flyers, etc. If you’re hosting an event with a partner, make sure they have a promotional schedule as well.**

3. **Focus on adding value and creating genuine connections, not just selling. Ask REN AI Assistant for ideas on how to best do this.**

4. **Make sure you collect contact information either before or during the event so you can effectively follow-up with attendees.**

5. **Use REN CRM 2.0 (and your REN AI Sales Agent, depending on your service level) to follow-up with attendees within 24 hours and beyond.**

Events are a powerful way to meet new prospects, strengthen existing relationships, and position yourself as an expert. By hosting or attending events consistently, you'll **build a network of loyal clients and referral partners**—helping you generate leads for years to come. In the next chapter, we'll explore how to leverage vendor partnerships to expand your audience and generate referrals.

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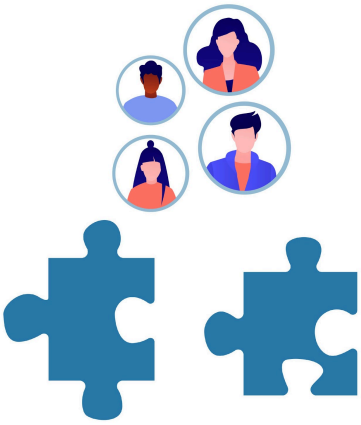
CHAPTER 17

Vendor Partnership Secrets

CHAPTER 17: Vendor Partnership Secrets

Big Idea



Vendor partnerships offer real estate agents and loan officers a highly effective and low-cost way to generate leads. By collaborating with businesses that serve the same audience but offer different services, you can expand your network, gain referrals, and provide more value to your clients. Examples of ideal vendor partners include contractors, home inspectors, title companies, CPAs, financial advisors, and even local businesses like interior designers or movers.

The key to successful vendor partnerships is to create mutually beneficial relationships—you refer business to them, and they refer business to you. These relationships go beyond transactional referrals; they help position you as a trusted, connected resource for your clients. Over time, strong vendor partnerships can create a steady stream of high-quality, warm leads.

Story

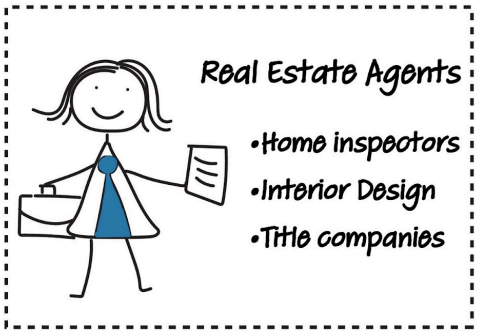
When Megan, a real estate agent, started her business, she realized she needed more referrals to grow. Instead of relying only on her sphere of influence and cold leads, she **reached out to local vendors.** She built a referral network with a **contractor, a moving company, and a CPA.**

Anytime one of Megan's clients needed a recommendation for a service, she connected them with someone from her network. In return, the contractor and CPA sent her several new clients over the course of the year—people who were **already pre-qualified and ready to buy or sell.** This network became a **consistent source of warm referrals,** and Megan didn't have to spend extra time or money on ads to get these leads.

Tactical Breakdown

Step 1: Identify Potential Vendor Partners

Your ideal partners serve **the same audience as you**, but they **offer complementary services**—meaning you're not in direct competition with them.



- **For Real Estate Agents:**
  - General contractors and home remodelers
  - Home inspectors
  - Interior designers and stagers
  - Title companies and escrow officers
  - Moving companies
- **For Loan Officers:**
  - CPAs, financial planners, and tax professionals
  - Real estate agents (yes, you need strong agent relationships!)
  - Insurance agents (homeowners insurance)
  - Divorce attorneys (clients needing new financing solutions)

Pro Tip: Don't limit yourself to just "obvious" partnerships. **Local small businesses** (like furniture stores or landscaping companies) can be valuable partners—they meet homeowners and buyers regularly and can pass referrals your way.

Step 2: Reach Out and Offer Value First

The foundation of a strong partnership is **offering value upfront**. Instead of asking for referrals immediately, **offer your services first**—this shows you're serious about building a mutually beneficial relationship.

Sample Outreach Script:
"Hi [Vendor's Name], I'm [Your Name], a local [real estate agent/loan officer]. I often get clients asking for recommendations, and I'd love to add you to my preferred vendor list. If you have any clients who might need real estate or mortgage help, I'd be happy to return the favor. Let's connect and explore how we can help each other!"

- **Offer introductions to your SOI:** If you know someone who could use the vendor's services, **send a referral to them first**.
- **Co-host events:** Suggest co-hosting a first-time buyer workshop, renovation seminar, or networking event.

Step 3: Create a System for Referrals

It's important to **create a simple system** for referring clients back and forth. Clear expectations help both parties know how to send referrals without confusion.

- **Exchange business cards or flyers** so both partners can easily refer clients.
- **Use a shared referral tracking sheet**: Track referrals in a Google spreadsheet so both you and your partner can follow up and stay organized.
- **Agree on lead quality:** Be clear about what kinds of clients each of you wants to receive. For example, let your vendor know if you only work with first-time buyers or high-net-worth clients.

Pro Tip: Some partners may offer **incentives** for referrals (like gift cards or discounts), but even without incentives, strong relationships can generate consistent referrals.

Step 4: Stay Top-of-Mind with Your Partners

Once you've established partnerships, stay in touch regularly to maintain strong relationships. Out of sight means out of mind—so it's important to check in with your vendors even when you don't have immediate business to exchange.

- **Quarterly check-ins:** Call or email your partners every 3 months to ask how things are going and if you can send them any referrals.
- **Invite them to events:** Host appreciation events or invite vendors to your open houses.
- **Send small gifts:** A handwritten note or a small gift (like coffee or snacks) shows your appreciation for their referrals.

Step 5: Track Results and Adjust as Needed

Not every partnership will produce leads immediately. It's important to **track the results** of your efforts and **adjust your strategy** if some partnerships aren't working.

- **Track referrals:** Use your CRM to log referrals from each partner.
- **Analyze lead quality:** Focus on vendors who send you high-quality, warm leads that are more likely to convert.
- **Evaluate the relationship:** If a partner hasn't sent any referrals over time, **reevaluate the relationship** and focus your energy elsewhere.

Pro Tip: If you find a great partner who sends you multiple referrals, **offer them exclusive perks**, like giving them priority access to your client events or inviting them to co-brand marketing campaigns.

Vendor partnerships allow you to **leverage the trust other businesses have with their customers** to generate high-quality referrals. By building relationships with **complimentary service providers**—like contractors, financial planners, and title companies—you can **expand your network** and provide additional value to your clients. Strong vendor partnerships **create a win-win situation**, where both you and your partners benefit from shared business opportunities.

Create a preferred vendor list. Put together a list of recommended partners (contractors, movers, CPAs, etc.) and share it with clients. **This positions you as a trusted resource** while keeping your partners happy and more likely to refer business your way.

Don't expect referrals right away. It takes time to build trust with new partners. **Be patient** and focus on building strong, long-term relationships rather than chasing quick wins.

- REN Success System/ Growth CEO - Resources

1. **Identify 5-10 potential vendor partners in your area (contractors, financial advisors, etc.).**

2. **Use REN AI Assistant to develop outreach content for each partner. Send emails and texts through REN CRM 2.0, or leverage REN Direct Mail to start a conversation.**

   Remember to offer value first by referring business or suggesting a co-hosted event.

3. **Create a referral tracking system to stay organized and aware of which partner is bringing in the most/best leads. Evaluate the results of this partnership after 3-6 months.**

Vendor partnerships are an essential part of a diversified lead-generation strategy. By building strong relationships with complementary businesses, you'll expand your network and **create a consistent flow of high-quality, warm referrals**.

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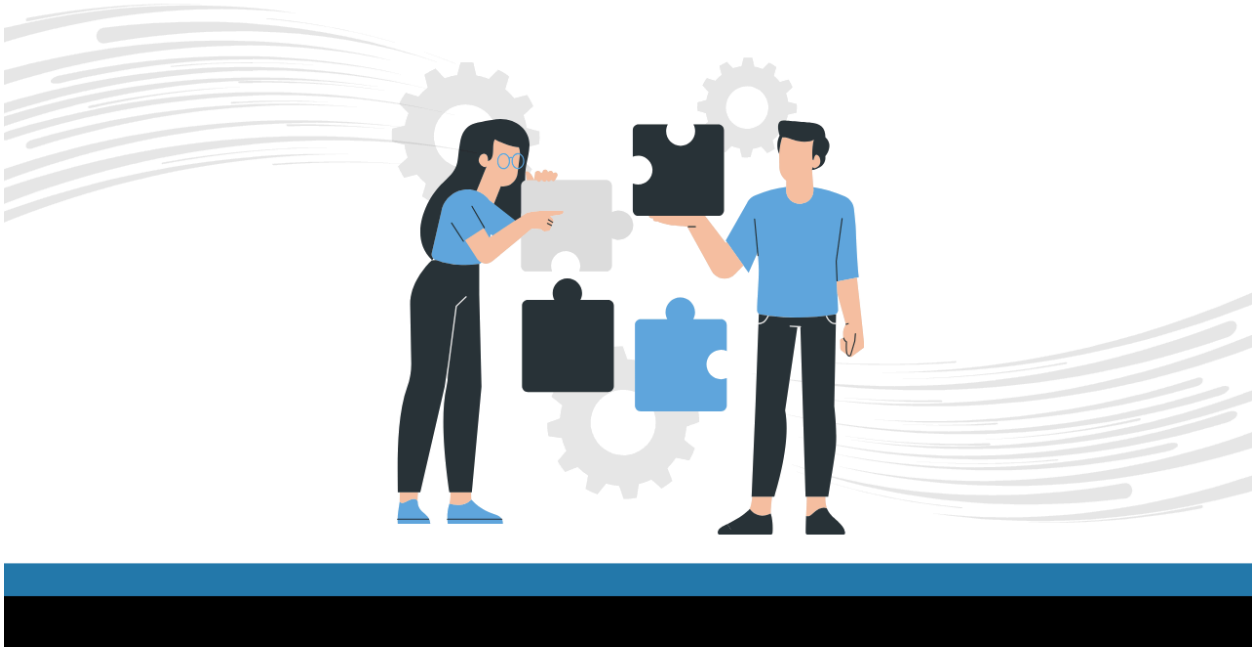
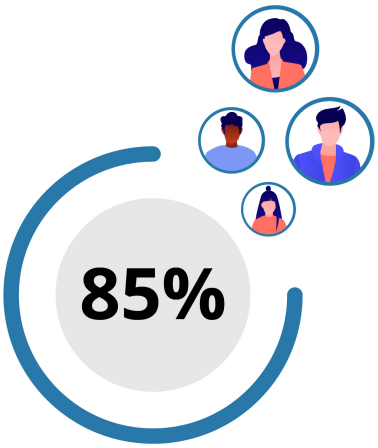
CHAPTER 18

Hiring Inside Sales Agents

CHAPTER 18: Hiring Inside Sales Agents



Big Idea



An **Inside Sales Agent (ISA)** is a specialized team member responsible for prospecting, qualifying, and nurturing leads so that real estate agents or loan officers can focus on closing deals. ISAs handle both inbound and outbound lead management, ensuring no potential client falls through the cracks. In today's competitive market, where **85% of leads require multiple follow-ups before responding**, having a dedicated ISA can significantly improve conversion rates and boost business efficiency.

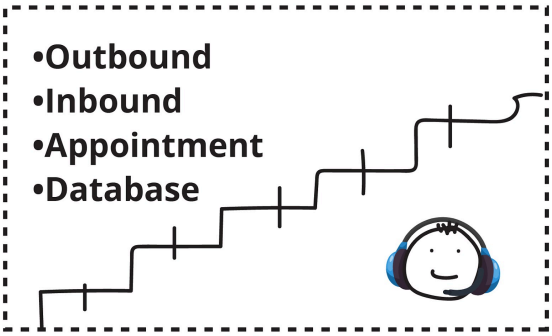
According to recent data, real estate teams that integrate ISAs have seen conversion rates jump from 10% to as high as 25% when ISAs focus on timely follow-ups and personalized engagement (Apex Lead Source, BoomTown). Furthermore, companies employing ISAs report 30% higher sales within six months, thanks to a consistent pipeline of qualified leads and fewer missed opportunities. This illustrates the crucial role ISAs play in bridging the gap between lead generation and deal closure.

Story

David, a top-performing real estate agent, found himself struggling to manage his workload as his business grew. He was spending more time chasing leads and scheduling appointments than closing deals. To fix this, David hired an ISA to take over daily lead follow-up and appointment setting. Within the first three months, the ISA had set 20 appointments, resulting in five closed deals—representing a 20% increase in sales volume.

David's experience highlighted that ISAs allow agents to focus on their core strengths—showing homes and negotiating deals—while leaving lead qualification and nurturing to the experts.

Tactical Breakdown



Step 1: Define the ISA's Role and Responsibilities

A well-trained ISA handles both **outbound and inbound leads**. Here's what their role entails:

- **Outbound Lead Generation:** Cold calling, reaching out to expired listings, FSBOs, and database contacts.
- **Inbound Lead Follow-Up:** Responding to leads from online sources, website inquiries, and sign calls.
- **Appointment Setting:** Qualifying leads and booking meetings with the agent or loan officer.
- **Database Management:** Tracking leads, setting follow-up reminders, and updating CRM systems.

Pro Tip: ISAs typically make **50 to 100 calls per day**, ensuring that every opportunity is pursued and no lead goes unaddressed.

Step 2: Choose In-House vs. Outsourced ISAs

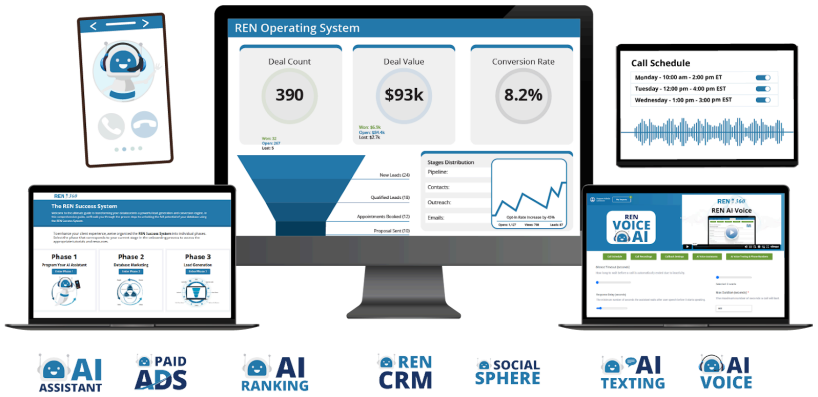
Real estate teams can either **hire an in-house ISA** or **outsource to an ISA service provider**.

- **In-House ISAs**: Offer better integration with your team and a deeper understanding of your business.
- **Outsourced ISAs**: Provide ready-to-go professionals with training and infrastructure, saving time and resources.

Using **outsourced ISA solutions** has helped some real estate firms increase conversion rates by **up to 40%** for high-value leads, such as luxury home buyers (Apex Lead Source).

Step 3: Equip ISAs with the Right Tools and Scripts

ISAs need tools like **Customer Relationship Management (CRM) software** to track leads and ensure timely follow-ups. Additionally, personalized scripts tailored to different scenarios—like expired listings or FSBOs—help them connect effectively with leads.



Example Script for Expired Listings:
"Hi [Name], I noticed your home was listed recently but didn't sell. I specialize in helping homeowners get top dollar quickly—have you thought about relisting your property?"

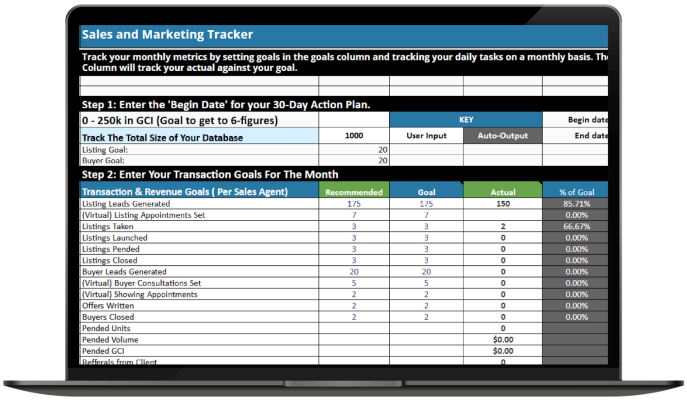
Pro Tip: Role-play scripts regularly with your ISAs to refine their skills and improve performance.

Step 4: Track Performance Metrics

Set **clear performance goals and KPIs** for ISAs to measure success, such as:

- **Appointments Set per Week**: Aim for at least 5-10 high-quality meetings.
- **Lead Response Time**: Contact new leads within 5 minutes to maximize conversion chances.
- **Follow-Up Consistency**: Ensure every lead gets 8-12 touchpoints, as most conversions occur after the 6th follow-up attempt.

According to real estate experts, **automated follow-up systems** integrated with CRMs enhance ISA efficiency by maintaining consistent communication with leads and booking more appointments (Apex Lead Source, The Real Estate Trainer).



Step 5: Monitor ROI and Scale Up

Using ISAs isn't just about closing deals—it's about optimizing lead management and **reducing customer acquisition costs**. Businesses that successfully integrate ISAs report:

- **Lead conversion rates doubled** (10% to 25%).
- **Customer acquisition costs** dropping from $500 to $300 per lead (Apex Lead Source).
- **Monthly sales growth improved by 10-15%** within the first six months.

Once your ISA team is delivering results, **scale up your efforts** by hiring additional ISAs or expanding into new lead sources like expired listings or referral partnerships.

SUMMARY

ISAs are the engine of lead conversion for real estate teams, bridging the gap between generating leads and closing deals. By focusing on consistent follow-ups, managing high lead volumes, and booking qualified appointments, **ISAs allow agents to focus on high-value tasks like negotiations and client meetings.** Whether in-house or outsourced, ISAs help scale operations, boost productivity, and increase sales.

PRO TIP

Consider using **AI-powered CRMs** to enhance ISA performance. Automation can handle repetitive tasks like follow-up emails or appointment scheduling, allowing ISAs to focus on high-value conversations with potential clients.

Don't expect immediate results. ISAs need time to **learn your systems, scripts, and client base** before delivering peak performance. Regular training and feedback are essential to help them succeed.

- REN Success System/ Growth CEO - Resources

1. **Decide whether to hire in-house or outsource ISAs. Depending on your level of service with REN, you can program and use our custom AI Sales Agent.**

2. **Use REN AI Assistant to develop scripts and role-play scenarios for your ISAs. If using REN AI Voice & Text, you can upload these scripts directly into their programming.**

3. **Equip your ISA team with the right tools. This means making sure they have access to your REN Dashboard and account, or at least have their own set up to use the same AI-powered tools.**

4. **Use your Sales & Marketing Tracker to monitor performance monthly and adjust strategies as needed to optimize results.**

By integrating ISAs into your business, you ensure that **every lead is followed up with, nurtured, and converted efficiently.** The next chapter will explore how to recruit and manage sales agents effectively to scale your operations even further.

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CHAPTER 19

Agent Attraction Secrets

CHAPTER 19: Agent Attraction Secrets

Big Idea

Recruiting talented real estate agents is crucial for scaling your business and expanding your reach. Strong agents can generate more leads, close more deals, and help grow your brand's reputation. However, recruitment trends have changed significantly. With fewer agents switching brokerages over the last few years, competition to attract top talent is fierce, but the tide is beginning to turn. In 2024, agent movement between brokerages is picking up after a multi-year decline, presenting an opportunity for brokerages to build stronger recruitment pipelines (Relitix, Real Estate Investor Pulse).

Surveys show that the majority of high-performing brokerages use **recruitment bonuses and personalized career development programs to attract and retain agents.** Meanwhile, 71% of recruiters leverage social media platforms like LinkedIn and Instagram to promote job openings and showcase company

culture, making recruitment a more public and competitive process (Xara, HousingWire).

Story

Sarah, the owner of a boutique brokerage, struggled to recruit agents from larger firms despite offering attractive commission splits. After reviewing her recruitment strategy, she realized that **her brokerage's value proposition wasn't being communicated effectively**. She began **attending networking events, offering mentorship programs, and using her social media channels to promote her team's success stories.**

Within months, two agents with promising track records joined her team, not because of the higher splits, but because **they saw opportunities for personal development and felt connected to her mission.** This experience taught Sarah that **recruiting isn't just about compensation—it's about selling the vision and culture of your business.**

Tactical Breakdown

Step 1: Define Your Ideal Agent Profile

Not every agent will be the right fit for your team. Start by identifying the **qualities and experience level** you're looking for:

- **New Agents**: Motivated but need mentorship and training.
- **Experienced Agents**: Bring established networks but may have higher expectations.
- **Specialists**: Focus on niches like luxury properties or first-time buyers.

Pro Tip: Use data from your **MLS system** to identify agents who show potential—like those with significant growth or those whose business has plateaued and may be looking for a change.

Step 2: Build Your Recruitment Funnel

Just like generating leads, recruiting requires a **strategic funnel with multiple touchpoints.**

- **Source Candidates from Multiple Channels:**

    - MLS data: Look for agents with recent shifts in performance.
    - Social Media: Use platforms like LinkedIn to promote openings and showcase your brokerage's culture.
    - Real Estate Schools: Partner with schools to attract new agents and offer incentives like covering pre-licensing fees.
- **Engage Continuously:** Recruitment doesn't end with a single message or meeting. Follow up regularly with promising candidates to **nurture relationships over time**.

Step 3: Offer Competitive Incentives Beyond Splits

Compensation is only part of what attracts agents. **Top-performing brokerages differentiate themselves** by offering:

- **Mentorship and Career Development:** Regular coaching, certifications, and training opportunities.
- **Flexible Work Models:** Allow agents to balance work-life priorities.
- **Recruitment Bonuses:** Provide bonuses for existing agents who refer new recruits.

Pro Tip: Brokerages like Keller Williams and eXp Realty have successfully grown by offering recruitment bonuses and passive income incentives for agents who help build their teams.

Step 4: Onboard Agents Effectively

The onboarding process is critical to retaining agents and getting them productive quickly.

- **Introduce Your Tools and Systems:** Provide hands-on training with your CRM and marketing platforms.
- **Set Clear Expectations:** Outline key milestones for the first 30, 60, and 90 days.

- **Foster Community:** Organize welcome events and assign mentors to new recruits to help them integrate with the team.

Step 5: Track Your Recruitment Success

Use your CRM or a recruiting-specific tracking system to monitor your recruitment efforts and refine your strategy.

- **Measure Key Metrics:** Track the number of interviews, offers extended, and hires made.
- **Analyze Retention Rates:** Monitor how long new agents stay with your brokerage and what factors contribute to their satisfaction.
- **Adjust Strategies as Needed:** If a recruitment channel isn't producing quality candidates, pivot to more effective methods.

Recruiting talented agents is essential for **scaling your real estate business and expanding your market presence.** In 2024, agent movement between brokerages is slowly increasing, giving brokerages the chance to **build strong recruitment funnels**. Success comes from identifying the right candidates, nurturing relationships, and offering more than just competitive splits—**mentorship, flexibility, and culture** are key drivers in attracting top talent.

Host regular networking events or career days to attract agents interested in making a change. Use these events to showcase your brokerage's unique strengths and values.

Don’t **over-rely on commission splits** to attract agents. Experienced agents are looking for **mentorship, career growth, and strong leadership**—without these, high splits alone won’t keep them around.

- REN Success System/ Growth CEO - Resources

1. **Use REN AI Assistant to develop your Ideal Agent Profile and create a list of potential recruits using MLS data and social media platforms.**

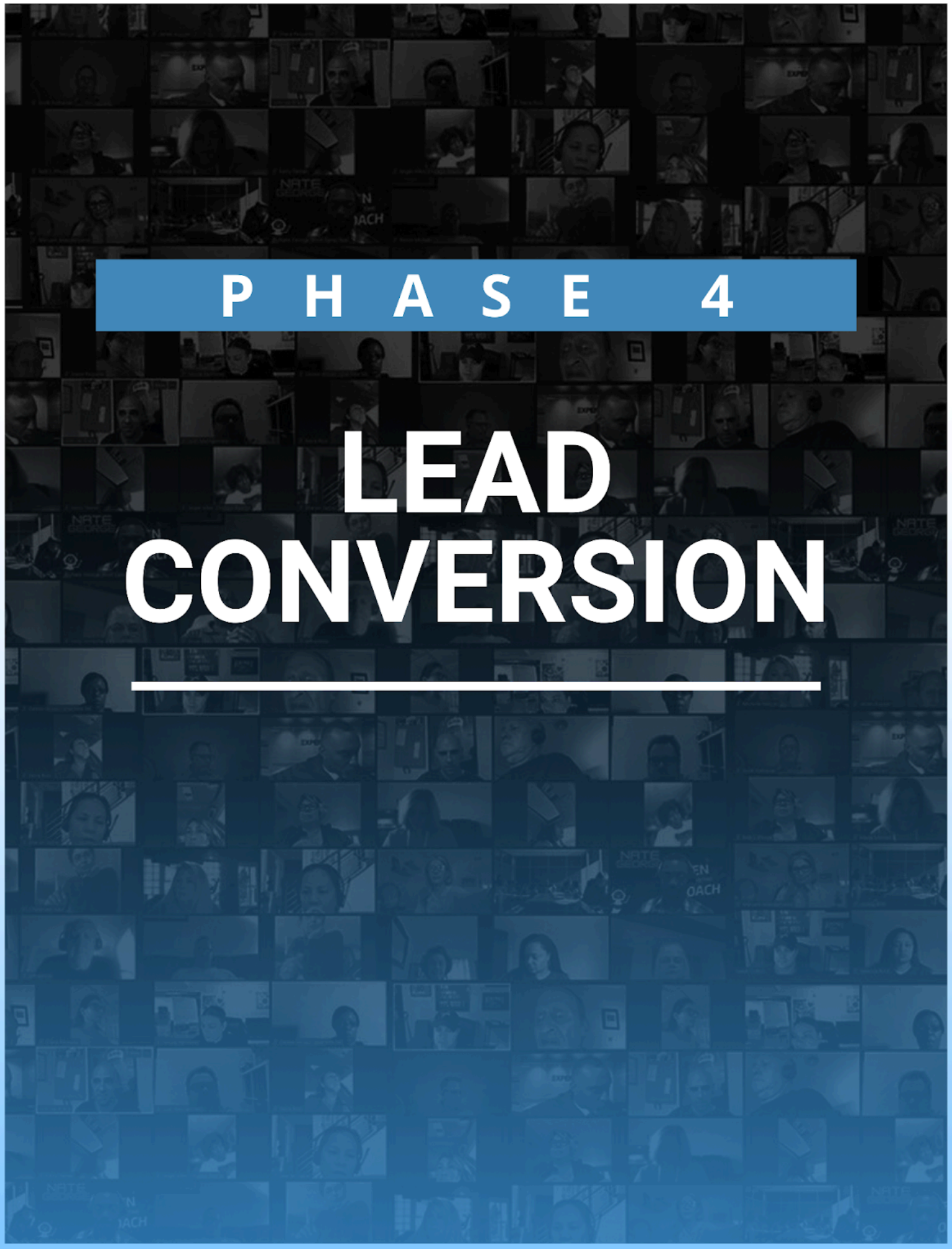
2. **Use REN CRM 2.0 to develop a recruitment funnel with multiple touchpoints, including calls, events, and follow-up emails.**

3. **Use REN AI Assistant to develop referral incentives for your current agents to help identify new talent.**

4. **Organize onboarding processes to get new agents up to speed quickly.**

5. **Use your Sales & Marketing Tracker to monitor recruitment KPIs and adjust your strategy based on feedback and performance.**

By following these steps, you’ll attract talented agents who align with your vision and **help grow your business sustainably**. Up next: We’ll explore the final step in building the ultimate lead machine—converting leads into lasting client relationships.



PHASE 4

LEAD CONVERSION

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CHAPTER 20

Prospecting and Lead Conversion

CHAPTER 20: Prospecting and Lead Conversion

"The world needs what you have to offer. Don't be shy about letting them know."
- Barbara Corcoran

The Big Idea

You can have all the leads in the world, a perfect website, and an amazing business card, but that doesn't guarantee sales. Without a proven prospecting and lead conversion system integrated into your business, you're leaving success to chance. Many businesses lack a **cohesive sales system**, resulting in sales representatives struggling to determine effective strategies on their own. As teams grow, best practices often get lost, scripts become outdated, and training and coaching are inconsistently executed.

The Cost of an Unstructured Sales System

- **79% of marketing leads never convert into sales**, primarily due to a lack of lead nurturing.

- **Companies that excel at lead nurturing generate 50% more sales-ready leads at a 33% lower cost.**
- **Sales teams that follow a structured sales process achieve 18% more revenue growth than those that don't.**

When we first ventured into real estate sales, despite our extensive experience in prospecting and lead conversion across various industries, we encountered a chaotic landscape. The available scripts were disorganized, outdated, and often lacked a foundation in the art and science of persuasion. This was concerning—not only for our immediate success but also for the future agents we planned to hire and the industry as a whole.

Determined to address this issue, we immersed ourselves in the subject. We acquired every prospecting and lead conversion course available in the industry. Over the next year, we committed to making a minimum of 50–100 phone calls, texts, and social media outreaches daily. This dedication resulted in booking 2–4 appointments per day and maintaining a pipeline of 20–30 listings at any given time—achieving success rates that were exceptional in the industry.

We meticulously documented our process, refining scripts and strategies, which culminated in the creation of a comprehensive **Prospecting and Lead Conversion Playbook**. This system has since empowered hundreds, if not thousands, of sales professionals to elevate their performance across various industries, including B2C and B2B sectors.

The most significant aspect of this system is its scalability and adaptability. It ensures that as scripts evolve, best practices are seamlessly integrated, and new training initiatives equip team members with the most effective methods. This commitment to continuous improvement enabled us to build one of the largest inside sales teams

in the U.S. real estate sector. At our peak, we were setting an average of **140 appointments per day** for our 30+ local agents and 700 referral partners nationwide, resulting in **billions of dollars in real estate transactions** generated from these appointments.

Now, we're eager to share this system with you. Let's delve into its core elements: **people, process, and tools**. This system will revolutionize your approach to prospecting, follow-ups, and lead conversion, positioning you and your team for sustained, scalable success.

The People

The foundation of any successful system is always the people—**you and your team**. No matter how sophisticated the tools or how refined the processes, it is the people who ultimately execute, innovate, and deliver results.

The first step in developing a selling system is creating a **framework for training and coaching**. This framework ensures that you and your team operate consistently and with purpose. To build this foundation, you need to evaluate three key pillars: **Mindset, Activities, and Skills**.

1. **Mindset**: Success in sales starts with the right mindset. This means fostering resilience, confidence, and a growth-oriented attitude within yourself and your team. A strong mindset helps navigate the inevitable challenges of sales and keeps the focus on long-term goals.

   It's also important that you teach your sales people that it's not about getting a sale, it's about finding the right people for your service, getting the sale, and making sure they have success with the outcome you sold them on.

2. **Activities**: Top producers don't leave their daily actions to chance. They follow structured plans, ensuring consistent prospecting, follow-ups, and customer engagement.

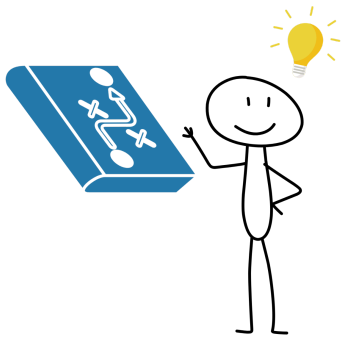
   High-impact activities, when repeated consistently, yield exceptional results.

3. **Skills**: Skills are the technical abilities that separate the good from the great. From mastering persuasive communication to understanding buyer psychology, skills are honed through deliberate practice, feedback, and refinement.

A continuous learning culture helps elevate performance across the board.

To go from good to great requires these three pillars—Mindset, Activities, and Skills—to work in harmony. **Top producers in any industry, especially sales, prioritize the development and alignment of these elements.** This approach transforms individuals into high performers and builds teams capable of achieving exceptional outcomes.

When building your system, always remember: while tools and processes create the foundation, it is the people who make the system come alive. Invest in yourself and in them, and success will follow.



The Process: Your Sales Playbook

The **process** is defined as a structured, repeatable series of steps designed to achieve a specific outcome. In the case of sales, it's embodied by **Your Playbook**—a comprehensive collection of tools, knowledge, and strategies that guide your team to consistent success.

Your Sales Playbook includes:

- **Industry Knowledge**: Insights and data that equip your team with the expertise needed to establish trust and authority.
- **Scripts and Dialogues**: Carefully crafted language frameworks for prospecting, qualifying leads, and closing deals.
- **Objection Handling**: Effective strategies to address and overcome resistance, turning hesitations into opportunities.
- **Presentations**: Engaging, persuasive materials designed to showcase value and close deals with confidence.
- **Follow-Up Materials**: Emails, texts, and value-driven content designed to maintain engagement and build trust over time.
- **Time Blocks**: Predefined schedules that ensure critical activities like prospecting, follow-ups, and skill development are executed consistently. Time blocks create accountability and focus, ensuring that the most impactful activities receive the attention they deserve.
- **Training on the Tools**: Equipping your team with the knowledge and confidence to use the technology and resources at their disposal effectively. This includes CRM systems, automation platforms, analytics dashboards, and other tools essential for managing leads, optimizing workflows, and tracking performance.

The most crucial aspect of this process is **documenting and updating best practices**. Sales materials must evolve to reflect advancements in the **science of persuasion** and **high-performance strategies**. Without this commitment to refinement, sales teams risk losing fundamental skills as the organization scales, leading to drops in performance and diminished results.

By continuously iterating and improving the Playbook, you ensure that every team member—from the newest hire to the most experienced salesperson—has access to the latest and most effective tools. This not only sustains performance but also allows your team to scale without losing the edge that drives results.

In sales, **your process is your roadmap**—and the Playbook ensures everyone is equipped to follow it to success.

Tools

The right tools are the backbone of any successful sales system. While people and processes form the foundation, **tools amplify efficiency, scalability, and consistency**—allowing teams to focus on building relationships and closing deals rather than getting bogged down by repetitive tasks.

Without the proper tools, sales teams often struggle with:

- Wasted time manually managing leads or switching between multiple systems.
- Missed follow-ups, resulting in lost opportunities.
- Limited visibility into performance metrics, making it hard to identify and address gaps.
- Inefficiencies that prevent scaling without sacrificing quality.

Essential Sales Tools

A high-performing sales system integrates tools that streamline operations, maximize productivity, and drive better results. These include:

- **CRM (Customer Relationship Management)**:
  The central hub for managing client relationships, tracking interactions, and

ensuring no lead falls through the cracks. A CRM provides the foundation for organizing and optimizing your sales efforts.

- **Pipeline Management**:
  A visual representation of your sales process, allowing teams to monitor where each lead stands and identify opportunities to move deals forward efficiently.
- **Multichannel Prospecting and Follow-Up Capabilities**:
  Tools that enable outreach and engagement across multiple channels—phone, email, text, and social media—ensuring a consistent and tailored communication strategy for every lead.
- **Lead Scoring**:
  A data-driven system for prioritizing leads based on their likelihood to convert, ensuring sales teams focus their energy on the most valuable opportunities.
- **AI Assistants**:
  A game-changer in modern sales systems, AI-powered assistants automate repetitive tasks, such as booking appointments, sending follow-ups, and analyzing lead behavior. These tools augment your team's capabilities, helping them operate more efficiently and effectively.

REN 360 Tools: Transforming Sales Teams

REN 360 integrates these essential tools into one seamless platform, providing the ultimate solution for high-performance sales teams:

- **CRM and Pipeline Management**:
  A single dashboard that connects all your tools and data, providing real-time insights into your pipeline and streamlining every stage of the sales process.
- **Multichannel Engagement**:
  REN AI Voice and Text Assistant automates outreach across phone, text, and email, ensuring no lead is left unattended.
- **Lead Scoring**:
  REN AI Ranking uses behavioral analytics to categorize leads as hot, warm, or cold, allowing teams to prioritize their efforts intelligently.
- **AI Assistants**:
  REN GPT and REN Create empower teams with AI-driven tools to craft compelling messages, follow-up content, and even ad campaigns—all tailored to the audience and situation.

Why Tools Matter

The tools your team uses define how effectively and consistently they can execute your sales process. By integrating CRM, pipeline management, multichannel capabilities, lead scoring, and cutting-edge AI assistants, REN 360 ensures your team operates at peak performance. These tools allow sales professionals to:

- Automate repetitive tasks and focus on building relationships.
- Maintain consistent follow-ups, improving lead engagement and conversion rates.
- Scale effortlessly while maintaining high performance and quality.
- Continuously improve using data-driven insights and advanced analytics.

With REN 360's suite of tools, you're not just giving your team the resources to succeed—you're equipping them with the competitive advantage needed to thrive in today's fast-paced sales environment. The tools you choose will shape your team's future, and REN 360 is designed to take them to the next level.

Document everything. From best practices to scripts and strategies, maintain a living "Playbook" that evolves with your team. Update it regularly to reflect new insights, feedback, and the latest trends in persuasion and performance. This ensures your team stays at the cutting edge and can onboard new members efficiently.

Don't rely solely on tools. While tools are powerful, they are only as effective as the people using them. Without proper training, a strong mindset, and a clear process, even the best tools will fall short. Avoid the mistake of thinking technology alone can replace the need for human connection and skill in sales.

- **Books**:
  - *The Challenger Sale* by Matthew Dixon and Brent Adamson
  - *Never Split the Difference* by Chris Voss
  - *Atomic Habits* by James Clear (for building consistent sales habits)
- **Online Tools and Platforms**:
  - REN 360 for an all-in-one sales solution
  - Calendly for scheduling automation
- **Training Programs**:
  - REN Success System
- REN Success System/ Growth CEO - Resources

1. **Use the 3 pillars (mindset, activities, and skills) on page 181 to evaluate your team. After you've identified gaps, use REN AI Assistant to create a plan to address them through targeted training and coaching.**

2. **Use REN AI Assistant to build or refine your sales playbook. Document scripts, dialogues, objection-handling techniques, and follow-up strategies.**

3. **Make sure you are using REN's suite of AI-powered tools to streamline workflows and enhance team efficiency.**

4. **Attend weekly REN 360 Workshops to provide your team with hands-on training to maximize the use of your tools.**

5. **Use your Sales & Marketing Tracker to track performance and identify areas for improvement.**

By following these steps, you can create a cohesive, high-performing sales system that sets your team up for sustainable success.

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CHAPTER 21

Prospecting Secrets

CHAPTER 21: Prospecting Secrets

"The secret to sustained sales success is so biased people don't want to believe it: Relentless, unstoppable prospecting."

Big Ideas and Stats:

1. **The Power of Relentless Prospecting:**
    - Top producers dedicate 3-4 hours a day to prospecting, aiming for 2-4 new appointments daily.
    - Average agents should commit at least 1-2 hours daily to build a robust pipeline.
2. **Know Your Numbers:**
    - Tracking your outreach-to-appointment conversion rate allows you to predict your future results and refine your strategies.

From Slump to Success

Mark, one of our most talented sales agents, hit rock bottom. Once a top performer, he found himself in an unexpected slump. After months of neglecting prospecting, his pipeline had dried up. Each day felt heavier than the last, and the thought of rebuilding his momentum seemed almost impossible. He was frustrated, discouraged, and ready to walk away.

The Conflict

Mark's struggles weren't just about numbers—they were personal. Every missed opportunity chipped away at his confidence. He felt stuck, staring at his nearly empty pipeline, wondering if he could ever get back on track. But then, he came across a game-changing concept: **The 30-Day Rule**.

The **30-Day Rule** taught Mark that the prospecting efforts he made today would determine his results 90 days from now. It was a simple yet powerful realization—if he wanted a thriving future, he had to act now. This was his moment of truth. Would he give up or rise to the challenge?

The Transformation

Mark decided to take control. He created a plan, committing to prospecting for **three hours daily** for 30 days. Determined to leave no stone unturned, he embraced a **multichannel strategy** that included:

- Cold calls to generate direct connections.
- Text messages to nurture relationships.
- Social media outreach to expand his network.

He tracked every interaction meticulously in a CRM, determined to hold himself accountable. The first week was tough. He faced rejection after rejection, but he kept going. By the second week, he started to see glimmers of hope—responses trickled in, and the first appointments were booked.

The Breakthrough

By the end of the first 30 days, Mark's pipeline was buzzing with activity. His discipline paid off, and he had created a system that worked. By the **90-day mark**, the results were nothing short of remarkable:

- Over **100 prospects** actively engaged in his follow-up system.
- Consistently closing **5-7 deals monthly**.

The Lesson

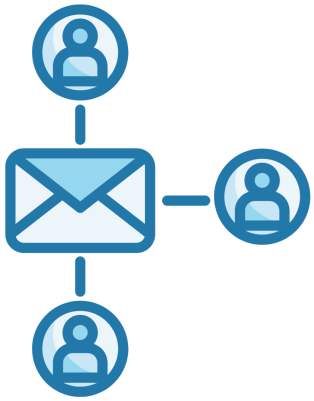
Mark's comeback wasn't just about rebuilding his pipeline; it was about rediscovering his resilience. He learned that setbacks are inevitable, but the ability to act decisively can turn challenges into opportunities. The **30-Day Rule** wasn't just a sales strategy for Mark—it became his lifeline, proving that consistent, disciplined action always leads to results.

Mark's journey is a reminder that heroes aren't born—they're made through hard work, grit, and the courage to face adversity head-on. For anyone struggling to regain their momentum, his story is proof that success is always within reach if you're willing to do the work.

Step-by-Step: Prospecting Process

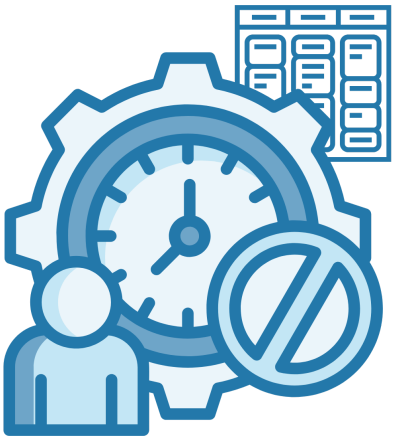
1. Research Leads and Build a Smart List

- **Identify Your Ideal Prospects:**
    - Define your target audience, such as first-time homebuyers, luxury clients, or commercial property investors.
    - Use criteria like location, demographics, buying history, and professional roles.
- **Leverage Data Sources:**
    - Use platforms like LinkedIn, Zillow, or MLS to identify potential prospects.
    - Analyze your CRM for leads who have shown interest in the past.
- **Segment Your List:**
    - Organize leads into categories like warm, cold, and referrals.
    - Create subgroups based on their potential value and likelihood to convert.



- **Use AI and Analytics:**
    - Tools like REN GPT can help rank and score leads based on their behavior, such as website visits, email engagement, or social media interactions.

2. Dedicate Time Blocks



- Allocate specific, non-negotiable blocks of 1-2 hours daily (3-4 hours for top producers) for prospecting.

3. Use Multichannel Outreach

- Combine text, phone calls, emails, and social media to engage prospects effectively.
- Single-channel outreach, like calling alone, only reaches 15% of your prospects. Multichannel engagement significantly increases your chances of success.

4. Leverage the 30-Day Rule

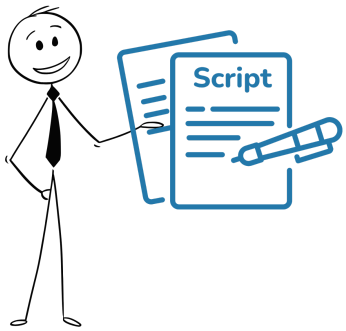
- Understand that prospecting today impacts your pipeline and closings three months down the line. Skipping prospecting today could lead to financial strain 90 days from now.

5. Maintain a 30/60/90-Day Follow-Up System

- Always have 100 warm prospects in your pipeline to ensure consistent closings. For every deal you close, replace lost prospects with 10-20 new ones.

6. Build and Use a Proven Script

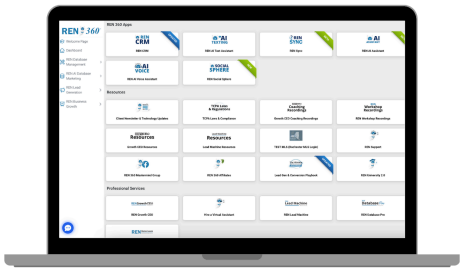
- Follow these steps to craft an effective prospecting call or message:
    - **Introduction:** Confirm you're speaking to the right person and introduce yourself.
    - **Purpose Statement:** Explain the reason for your outreach and what's in it for them.
    - **Qualifying Questions:** Identify their pain points, goals, and motivations.
    - **Value Proposition:** Tie their needs to your solutions, focusing on time, money, and hassle.



    - **Call to Action:** Lead them to schedule an appointment or take the next step.
    - **Confirm Appointment:** Ensure mutual respect for each other's time.

7. Leverage AI and Digital Marketing

- Use AI tools and digital marketing strategies to automate lead generation. This allows you to spend more time nurturing leads and less time prospecting for new ones.



8. Track and Analyze Your Numbers

- Know your outreach-to-appointment conversion rate and refine your approach for higher efficiency.

9. Train and Coach Daily

- **Assess Areas for Improvement:** Review your performance regularly to identify weaknesses.
- **Practice What Works:** Double down on strategies yielding results.
- **Role-Playing and Feedback:** Use role-play scenarios or AI tools like REN GPT to refine scripts and approaches.
- **Attend Coaching Sessions:** Work with mentors or peers to continually improve.

- **Monitor Trends:** Stay updated on real estate trends and new prospecting techniques to keep your strategy fresh.

SUMMARY

Prospecting is the cornerstone of any successful sales career. A disciplined approach, consistent effort, and a multichannel strategy ensure a steady flow of leads. By mastering tools like the 30/60/90-day system, leveraging technology, and refining scripts, you can build relationships instead of cold calling endlessly.

Adding daily training and coaching ensures consistent improvement and helps you double down on what works. The 30-Day Rule and the Law of Replacement ensure your pipeline stays full, guaranteeing future success.

PRO TIP

For every deal you close, replace the lost prospects with 10-20 new ones. This keeps your pipeline full and your business thriving.

WARNING

Failing to prospect consistently can lead to a dry pipeline, sales slumps, and financial strain. Avoid single-channel prospecting—it limits your reach and effectiveness.

RESOURCES

1. **People**
    - *Fanatical Prospecting* by Jeb Blount.
    - *The Psychology of Selling* by Brian Tracy.
2. **Process**
    - Download the Prospecting Playbook
3. **Tools**
    - Start using REN360 for your Daily Prospecting
    - REN Success System/ Growth CEO - Resources

1. **Use REN AI Assistant to help you come up with a daily and weekly schedule. Ensure 1–2 hours is set aside each day for focused prospecting.**

2. **Use REN CRM 2.0 to organize your leads by segmenting them into categories: warm, cold, and referrals.**

3. **Use REN AI Assistant to create multichannel marketing campaigns for each category focused on 30/60/90 day follow-ups.**

4. **Set up these campaigns inside REN CRM 2.0, REN Paid Ads, REN Direct Mail, etc. If you have a higher level of service, you can leverage your AI Sales Agent (REN AI Voice & Text) to execute the campaigns.**

5. **Try to keep at least 100 prospects in your pipeline at once.**

By embracing the secrets of relentless prospecting, using a multichannel approach, and committing to daily training, you'll build a pipeline that sustains consistent growth and success in your real estate business.

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CHAPTER 22

Presenting

CHAPTER 22: Presenting

“People don't care how much you know until they know how much you care."
— John C. Maxwell

Big Idea

A successful sales presentation is built on a foundation of trust and understanding. By prioritizing rapport and qualifying prospects, you can tailor your presentation to meet client needs, paving the way for meaningful connections and better outcomes.

Alex’s Transformation: From Pitching to Connecting

Alex, a talented real estate professional, had a passion for helping people find their dream homes. Yet, despite his knowledge and enthusiasm, he often left client presentations feeling defeated. No matter how much effort he put into preparing, the results were the same: polite nods from prospects and **no commitments.** Frustration crept in as he wondered why his pitch wasn’t resonating.

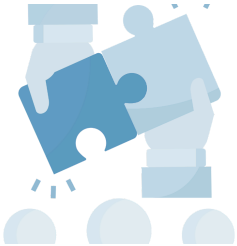
The Conflict

Alex was doing what he thought was expected—diving straight into market trends, home features, and pricing strategies. But instead of inspiring trust, **his approach felt impersonal.** Prospects didn’t engage deeply, and Alex began doubting his ability to truly connect. The turning point came after a particularly discouraging presentation where the prospect left without even discussing next steps.

He knew something had to change.

The Turning Point

Alex decided to attend a workshop on building rapport and qualifying leads. During the training, he realized where he had gone wrong: he was focusing on **what he wanted to share**, not what the client needed to hear. The workshop introduced him to new strategies, including:



- **Active Listening**: Truly hearing what the client says and responding thoughtfully.
- **Matching Tone**: Adapting his communication style to reflect the client's energy and pace.
- **Probing Questions**: Asking meaningful questions to uncover the client's goals, fears, and desires.

These tools gave Alex the confidence to shift his approach. Instead of delivering a one-size-fits-all pitch, he would focus on understanding and aligning with the client's unique needs.

The Transformation

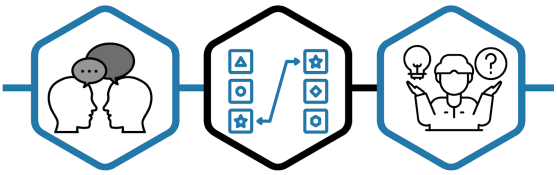
At his very next presentation, Alex started with a simple, open-ended question:
"What does your ideal home look like?"

The prospect's eyes lit up. Instead of nodding politely, they leaned in, excited to share their vision. Alex listened intently, mirroring their tone and asking follow-up questions to uncover their motivations. The conversation felt natural, even effortless.

By the time Alex presented the home, he had already won their trust. The features he highlighted aligned perfectly with the client's priorities because he had taken the time to truly understand them. The deal closed that same day, and Alex not only gained a client but a loyal advocate who referred friends and family.

The Lesson

Alex's story highlights a powerful truth:
connection comes before conversion. By shifting his focus from pitching to understanding, Alex turned his presentations into conversations. The tools he learned—active listening, tone matching, and probing questions—helped him uncover what truly mattered to his clients, creating trust and emotional engagement.



For anyone struggling to connect during sales presentations, Alex's transformation is proof that a small change in approach can lead to monumental results. When you prioritize the person over the pitch, success follows naturally.

The Seven Pillars of a Successful Sales Presentation

1. Setting the Stage: Building Rapport and Qualifying - Before diving into the presentation, establish trust and ensure the prospect is a good fit for your services.

How to Build Rapport:

- **Mirror and Match**:
    - Adjust your speech rate and tone to match the client's natural energy.
    - Use similar language and phrases to build familiarity.
- **Active Listening**:
    - Listen carefully, paraphrase their statements, and avoid interrupting.
    - Ask open-ended questions like, "What's most important to you in this decision?"
- **Find Common Ground**:
    - Share genuine compliments or acknowledge smart choices.
    - Bring up shared interests when relevant.

Qualify the Prospect:

- **Timeline**: "When are you looking to make a decision?"
- **Budget**: "What's your price range for this purchase?"
- **Motivations**: "Why is this important to you now?"

By building trust and qualifying early, you ensure the presentation is relevant and focused.

2. Building Value: Problem, Solution, Results - Structure your value proposition

around three key pillars to show how your service meets their needs.

Key Pillars of Value:

- **The Problem You Solve**: Identify the pain points they're facing and frame your service as the solution.
  Example: "Finding the perfect home can be overwhelming in a market like this. That's where I come in."

- **Why Your Service is Better**: Highlight your unique selling points, such as experience, network, or exclusive resources.
  Example: "I specialize in uncovering off-market opportunities that others miss."

- **The Results They Can Expect**: Paint a clear picture of the outcomes they'll achieve by working with you.
  Example: "This approach will save you time and ensure you get the best deal possible."

3. Creating Urgency Through Presentations - Encourage the prospect to act by showing why now is the right time to move forward.

Techniques to Create Urgency:

- **Leverage Data**: Share insights on market trends, inventory levels, or rising prices.
  Example: "Homes in this neighborhood are selling within 7 days—acting quickly gives you an advantage."

- **Use Storytelling**: Share success stories of clients who benefitted from acting decisively.

- **Highlight Opportunity Costs**: Show what they risk losing by waiting too long.
  Example: "Delaying could mean missing out on lower interest rates."

4. Getting Yes Responses: Confirming Agreement - Throughout the presentation, ask small confirmation questions to keep the prospect engaged and aligned.

Examples of Yes Questions:

- "Does this sound like what you're looking for?"

- “Would this fit your budget and timeline?”
- “Is this the kind of solution that would help you achieve your goals?”

These small agreements build momentum toward the final decision.

5. Enrolling: Assuming the Sale - Confidently guide the client to the next steps as though they’ve already decided to move forward.

How to Assume the Sale:

- Use positive, action-oriented language:
  Example: “The next step is scheduling a time to finalize the paperwork—does tomorrow work for you?”
- Focus on logistics, not decision-making, to signal confidence.

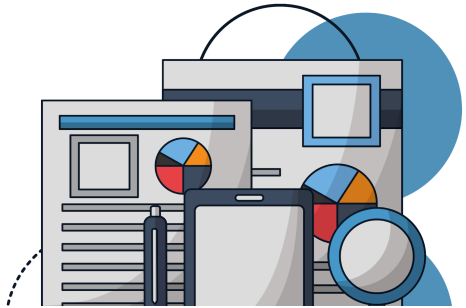
6. Overcoming Objections - View objections as opportunities to deepen trust and clarify value.

Key Strategies:

- **Listen and Validate**:
  - Acknowledge their concerns: “I understand why that’s a concern; let’s address it.”
- **Address the Concern**:
  - Provide solutions or alternatives.
    Example: “If budget is the issue, we can look at options with a lower upfront cost.”
- **Reframe for Value**:
  - Redirect to benefits: “This cost reflects the long-term savings you’ll gain.”

7. Strong Follow-Up and Tracking Metrics - Even after the presentation, the work isn’t done. Follow-up ensures you stay top of mind and can close more deals.

Follow-Up Best Practices:



- **Immediate Recap**: Send a summary email highlighting key points discussed and next steps.
- **Provide Value**: Share additional resources or answers to questions they raised.
- **Schedule the Next Step**: Set a specific date and time for a follow-up call or meeting.

Track Your Metrics:

- Keep records of responses, objections, and outcomes in a CRM.
- Analyze data to refine your approach and identify areas for improvement.

Offer three clear options during your proposal (basic, standard, premium). This gives the client flexibility while positioning your premium option as the best value.

Don’t skip over objections or rush through them. Addressing concerns with patience and empathy is essential to building trust and closing the deal.

1. **Use REN AI Assistant to prepare discovery questions to uncover client needs and motivations.**
2. **Practice delivering your pitch, adapting tone and language to different personalities.**

3. **Roleplay handling objections to refine your responses. REN AI Assistant can help you come up with the most common objections for your niche. A strong presentation can also help you here.**

4. **Use a REN CRM 2.0 to track client engagement and follow-ups systematically.**

By mastering these seven pillars, you'll transform your presentations into powerful tools for connection, trust, and success.

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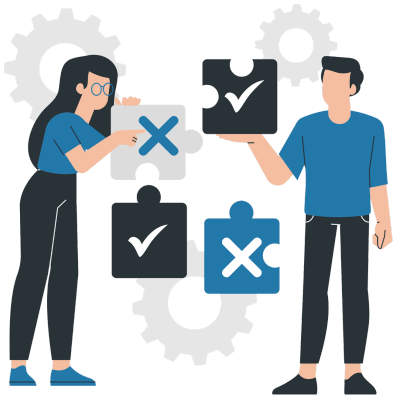
CHAPTER 23

Closing

CHAPTER 23: Closing

Big Idea



Presenting your proposal effectively means summarizing your understanding of the client's needs and how you intend to meet them. This stage sets the stage for negotiation and closing.

Handling objections gracefully is where your problem-solving skills shine. Listen carefully, validate their concerns, and present solutions or alternatives that overcome these hurdles, always keeping the client's best interest at heart.

The Story

Sarah, a rising star in her sales team, prided herself on her ability to connect with prospects. Yet, when it came time to present proposals and handle objections, she often stumbled. Prospects expressed doubt, hesitated to commit, or stalled for time. Frustrated, Sarah felt she was losing deals she should have closed. Determined to improve, she set out to transform her approach.

Handling Objections Gone Wrong

Sarah realized the problem: while she excelled at rapport-building and understanding client needs, she struggled to confidently present her proposals and handle objections. Her presentations were too focused on features rather than solutions, and she often found herself defensively responding to objections, which eroded trust.

After a particularly tough loss, where a client chose a competitor despite her best efforts, Sarah decided it was time to refine her skills.

The Turning Point

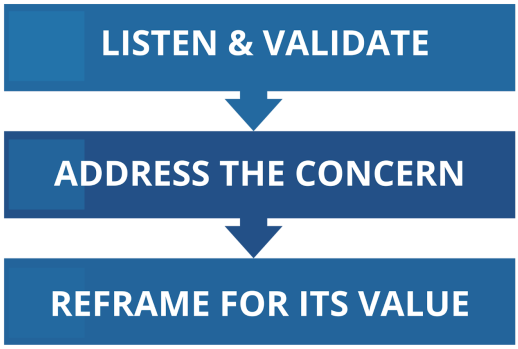
Sarah attended a workshop and used her new **AI Assistant to help her with roleplay** on **proposal delivery and objection handling**. She learned a structured approach to presenting her proposals and gracefully addressing objections:

1. **Summarize Client Needs**: Start by reflecting the client's priorities to show understanding.
    - *Example*: "You mentioned that finding a home with a short commute and a spacious backyard for your family is your top priority."
2. **Present Tailored Solutions**: Clearly connect the proposal to their specific needs.
    - *Example*: "This home is just 10 minutes from your office and has the backyard space you've been looking for, perfect for your children and outdoor gatherings."
3. **Invite Feedback**: Create an open dialogue by asking for their thoughts.
    - *Example*: "How does this align with what you've envisioned?"

The Objection Phase

Handling objections was where Sarah previously struggled. She often became defensive or rushed to close, which pushed clients away. From the workshop, she learned the three-step formula for overcoming objections:

- **Listen and Validate**:
    - "I understand why you'd feel that way—this is a significant decision."
- **Address the Concern**:
    - "If the price is a concern, let's look at financing options that could make this more comfortable for your budget."
- **Reframe for Value**:
    - "This investment ensures your family gets the home they've always dreamed of in the ideal location."



The Transformation

Armed with her new skills, Sarah put them into practice during her next presentation. When presenting her proposal, she focused on summarizing the client's needs, aligning her solutions with their goals, and inviting collaboration. The conversation was smooth, and the prospect felt heard and valued.

When the client raised concerns about the price, Sarah remained calm. She validated their concerns, presented financing options, and reframed the price as an investment in long-term happiness and convenience. Instead of seeing the objection as a hurdle, she saw it as an opportunity to strengthen trust.

By the end of the meeting, the client committed to the deal.

The Lesson

Sarah's story illustrates the power of preparation, empathy, and confidence in delivering proposals and handling objections. By summarizing client needs, presenting tailored solutions, and gracefully addressing concerns, she not only closed the deal but also earned the client's trust and loyalty.

For anyone struggling with proposals and objections, Sarah's transformation is proof that mastering these skills can turn hesitation into action and objections into opportunities.

Empathy:

- Respond with empathy to demonstrate that you understand and respect their concerns, such as, "I can see how that would be important to you."

Clarification and Isolation:

- Clarify the objection to ensure a proper understanding. Ask probing questions if necessary.
- Example: "Could you elaborate on what aspects of career development are most important to you?"

Responding to Objections:

- Address the objection directly with relevant information, examples, or data about the company or role.

Step-by-Step Breakdown: Crafting and Presenting Proposals & Handling Objections

1. Crafting a Winning Proposal

Your proposal is the bridge between the client's needs and your solution. It should clearly demonstrate value and set the stage for closing.

Key Elements of a Winning Proposal:

- **Summary**: Reaffirm the client's challenges and how your solution addresses them.

- **Needs Analysis**: Showcase your understanding of their specific pain points.
- **Proposed Solution**: Provide a clear, tailored solution, offering **three service options** to cater to different levels of commitment.
- **Benefits and ROI**: Quantify the expected results and explain the return on their investment.
- **Pricing and Terms**: Present the pricing structure transparently.
- **Call to Action**: Outline the next steps, such as scheduling a follow-up meeting or signing agreements.

2. Presenting with Confidence

Delivering the proposal is just as important as its content. Engage the client with confidence and clarity.

Presentation Tips:

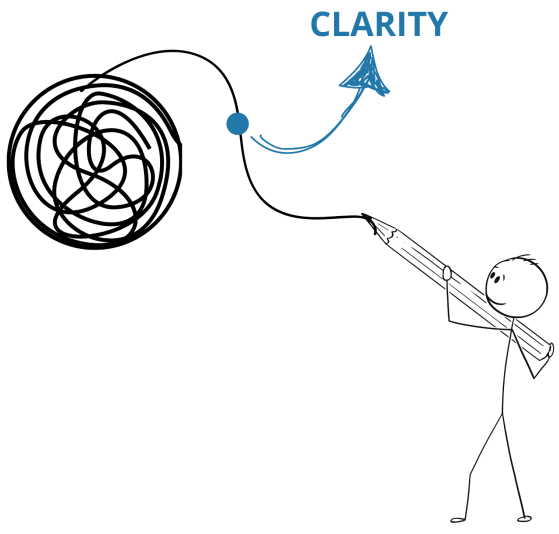
- **Tailor Your Delivery**: Adapt your tone, pace, and language to suit your audience.
- **Highlight Value**: Emphasize the benefits and outcomes, not just the features.
- **Encourage Interaction**: Create an open dialogue by inviting questions and feedback.
- **Guide to Action**: Clearly show them the path to success over the next 90 days.

3. Overcoming Objections

Objections are a natural part of the process and a sign of genuine interest. Handle them gracefully to build trust and confidence.

Steps to Handle Objections:

1. **Active Listening**: Pay close attention and let the client fully express their concerns.
2. **Validate Concerns**: Acknowledge their perspective without dismissing it.
    - *Example*: "I understand why that might be a concern."
3. **Clarify the Objection**: Ask probing questions to uncover the root of the objection.
    - *Example*: "Can you elaborate on what's holding you back about this step?"



4. **Present Solutions**: Offer specific options or compromises to resolve their concerns.
5. **Reframe for Value**: Shift the focus back to the benefits they'll receive.

4. Enrollment: Securing Commitment

Guide the client through the process of committing to your solution with confidence and enthusiasm.

Enrollment Best Practices:

- **Clear Communication**: Outline next steps, timelines, and expectations.
- **Set Expectations**: Discuss roles, responsibilities, and communication protocols for both sides.
- **Walk Through Contracts**: Review agreements together, ensuring transparency and clarity.
- **Address Hesitations**: Use active listening and validation to resolve last-minute doubts.
- **Enthusiastic Close**: Conclude with enthusiasm and confidence to inspire trust.

A well-crafted proposal and confident handling of objections are critical to sales success. By focusing on understanding the client's needs, presenting tailored solutions, and maintaining open communication, you can guide them smoothly through the enrollment process and secure their commitment.

Always offer **three service options** in your proposal (basic, standard, premium). This strategy provides flexibility, reduces price objections, and positions your premium option as the best value.

Avoid being defensive when handling objections. Dismissing concerns or rushing through the process can erode trust. Instead, listen actively and focus on providing solutions that align with the client's needs.

- **Books**:
  - *The Challenger Sale* by Matthew Dixon & Brent Adamson
  - *Never Split the Difference* by Chris Voss
- **Templates**:
  - Proposal templates with pre-designed summary, needs analysis, and benefits sections.
- **Tools**:
  - CRM systems to track client interactions and feedback.
  - REN Success System/ Growth CEO - Resources

1. **Use your REN AI Assistant and the key elements outlined above to craft a compelling, client-specific proposal. Emphasize your niche's pain points and motivations and highlight your irresistible offer (Chapters 7 & 8 dive deeper into these topics if you want to review).**

2. **Practice! Roleplay common objections with your team or a colleague to refine your responses. REN AI Assistant can generate the most common objections for your niche.**

3. **Use REN CRM 2.0, REN Direct Mail, and REN AI Voice & Text (depending on your level of service) to schedule multichannel automated follow-ups over the next 30/60/90 days.**

4. **Use the Sales & Marketing Tracker to track your metrics. This includes not only presentations, but also objections, resolutions, and client decisions to continuously improve your process.**

By mastering the proposal, objection handling, and enrollment process, you'll consistently convert prospects into loyal clients while building a foundation for long-term success.

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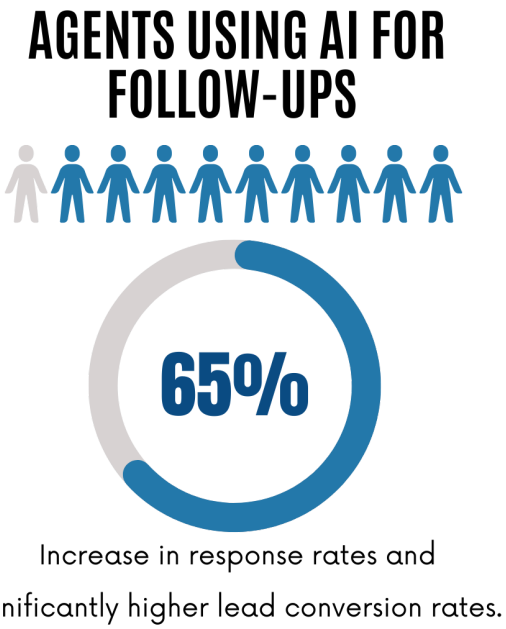
CHAPTER 24

Follow-up

CHAPTER 24: Follow-Up

"The fortune is in the follow-up."
— Jim Rohn

Big Idea



In real estate, follow-up is the bridge between initial interactions and long-term relationships. By staying in touch, addressing concerns, and consistently adding value, you demonstrate your commitment to serving clients and position yourself as their go-to real estate professional.

Emma's Transformation: The Power of Thoughtful Follow-Up

Emma, a new coching clien and hardworking real estate agent, struggled with pipeline management and follow-up. She would send a polite thank-you email and wait for the client to reach out if they were interested. At first, this approach seemed efficient, but over time, she noticed a troubling pattern. Clients who had once shown interest drifted away, often working with other agents. Emma felt frustrated and unsure of how to keep her clients engaged.

The Conflict

One day, Emma lost a promising client to another agent. The client mentioned how the other agent had stayed in touch and provided helpful updates throughout their home-buying journey. This stung. Emma realized that while she was good at building initial connections, her follow-up game was practically nonexistent. She knew something had to change if she wanted to turn her leads into loyal clients.

The Turning Point

Determined to improve, Emma decided to implement a structured follow-up strategy. She researched best practices and crafted a plan that would keep her top of mind for potential clients without being pushy. Her strategy included:

- **Personalized Emails**: Sent within 24 hours of every meeting, recapping the discussion and offering additional resources.
- **Regular Check-Ins**: Scheduling follow-ups to answer questions, share new listings, or simply touch base.
- **Value-Driven Updates**: Providing market insights, tips, and resources tailored to the client's needs.

Emma's goal was simple: to stay relevant and helpful, demonstrating her commitment to her clients' success.

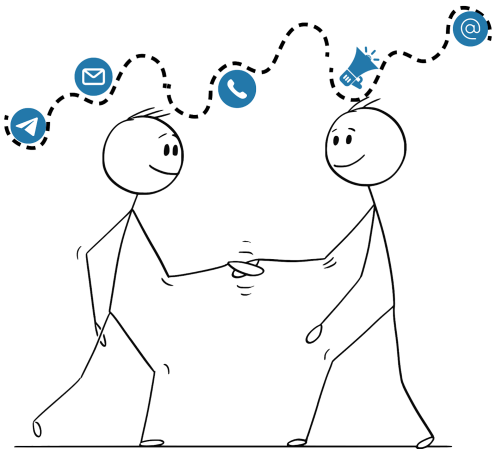
The Transformation

Emma's structured follow-up approach quickly began yielding results. One client, initially hesitant about making a decision, appreciated Emma's consistent communication and thoughtful updates. Her reliability and attention to detail built trust over time.

That client eventually purchased their dream home with Emma's guidance. But the story didn't end there. Impressed by Emma's dedication, they referred two friends who were also looking to buy homes. Emma's improved follow-up strategy didn't just close a single deal—**it created a ripple effect of trust and loyalty.**

The Lesson

Emma's journey shows the transformative power of thoughtful follow-up. By staying consistent, personalizing her communication, and providing value, Emma turned potential losses into opportunities. Her clients didn't just see her as an agent; they saw her as a trusted partner.



For any professional wondering how to stand out in a competitive field, Emma's story is a reminder: the fortune is in the follow-up. With discipline and empathy, a structured follow-up process can turn one-time leads into lifelong relationships and referrals.

Tactical Breakdown

1. The Importance of Follow-Up

Follow-up is essential for nurturing trust, addressing concerns, and staying top of mind.

Why Follow-Up Matters

- **Staying Top of Mind:** Regular communication ensures clients remember you when they're ready to take the next step.
- **Addressing Concerns:** Follow-up gives clients a chance to ask additional questions or express reservations.
- **Building Relationships:** Consistent touchpoints help strengthen personal connections and rapport.

2. Following Up Effectively

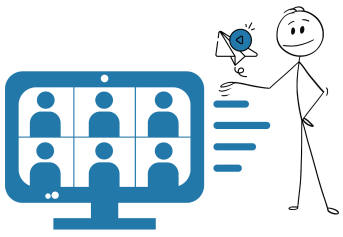
Key Follow-Up Strategies

1. **Prompt Follow-Up:**
    - Reach out within 24 hours of the initial meeting or property showing.
    - Example: Send a thank-you email summarizing the meeting and confirming any next steps.
2. **Personalized Communication:**
    - Tailor your messages to reflect specific discussions from your last interaction.
    - Example: "I remember you mentioned wanting a big backyard for your dog—here's a property I think you'll love."

3. **Provide Value:**
    - Share additional resources, like market reports, financing tips, or links to relevant articles.
    - Example: "Here's a guide to local school districts that might be helpful as you decide."
4. **Schedule the Next Step:**
    - Propose a follow-up call, meeting, or event to keep the momentum going.
    - Example: "Would you be available this Thursday to discuss next steps?"

3. Adding Value Between Follow-Ups

Think creatively about ways to keep clients engaged and demonstrate your commitment to their needs.



Ideas to Add Value

- **Share Educational Resources:**

    - Send videos or webinars on topics like “How to Prepare for a Mortgage Pre-Approval.”
- **Personalized Market Insights:**
    - Provide updates on properties or neighborhoods they’re interested in.
- **Gift Thoughtful Tokens:**
    - A small gesture, like a local guidebook or a personalized note, can leave a lasting impression.

4. Cultivating Long-Term Relationships

Follow-up isn’t just about closing the immediate deal; it’s about building a relationship that lasts.

Repeat Business

- **Stay Connected Post-Sale:**
    - Celebrate milestones like their move-in anniversary with a card or message.
    - Send updates on their property’s market value.

Encourage Referrals

- **Referral Programs:**
    - Offer incentives, such as gift cards or discounts, for referrals.
    - Example: “Refer a friend, and I’ll treat you to a $100 gift card upon closing.”
- **Testimonials:**
    - Ask satisfied clients to write reviews or provide testimonials for your website or social media.

5. Creating a Structured Follow-Up Plan

Sample Follow-Up Timeline:

Time	Action
Within 24 Hours	Send a personalized thank-you email summarizing the meeting and confirming next steps.

1 Week Later	Share relevant resources, such as market updates or additional prope options.
2 Weeks Later	Schedule a follow-up call to discuss progress and address any new questions.
Ongoing	Stay in touch with periodic check-ins, milestone celebrations, and value-added content.

Mastering follow-up is a cornerstone of real estate success. By staying top of mind, addressing concerns, and consistently adding value, you build trust and foster lasting relationships. This approach not only leads to repeat business but also transforms satisfied clients into loyal advocates who refer you to their network.

Always end follow-up interactions with a clear call to action. Whether it's scheduling the next meeting or asking for feedback, give clients a reason to stay engaged.

Avoid generic, one-size-fits-all follow-ups. Clients appreciate personalized attention and are more likely to respond positively to tailored communication.

1. CRM Platforms: Tools like Salesforce or Follow Up Boss to organize and automate follow-ups.
2. Email Templates: Pre-written thank-you and check-in emails to save time while staying personalized.
3. *The Art of Closing the Sale* by Brian Tracy: Insights on effective communication and follow-up.
4. REN Success System/ Growth CEO - Resources

1. **Review your daily, weekly, and monthly calendar to ensure you've made time specifically for follow-ups. Every single client interaction needs to be follow-ed up with.**

2. **Use REN AI Assistant to create 10x10x24 follow-up campaigns. Focus on adding value and educating your clients to position yourself as an expert and the obvious choice in your market.**

3. **Use REN CRM 2.0, REN Direct Mail, and REN AI Voice & Text to set up automated campaigns over the next 30/60/90 days.**

4. **Use REN Social Sphere to stay engaged on social media and leverage REN Paid Ads to retarget anyone you've spoken to previously.**

By mastering the art of follow-up, you not only enhance your client relationships but also build a solid foundation for repeat business and referrals, ensuring long-term success in real estate.

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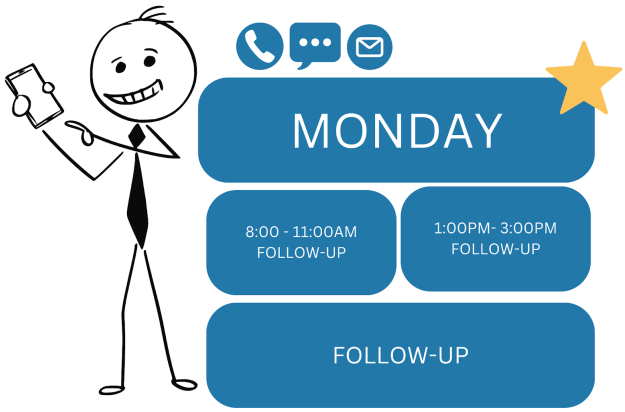
CHAPTER 25

Referrals and Repeat Business

CHAPTER 25: Referrals and Repeat Business

Big Idea



Repeat business and referrals are crucial for long-term success in real estate, but nurturing these relationships requires consistent follow-up. By timeblocking dedicated periods each week for client follow-up, you ensure that this vital task remains a priority in your busy schedule.

Story

When David first started in real estate, he focused almost entirely on finding new leads. He'd often tell himself, **"I'll check in with past clients later."** But later never came. Months passed, and David realized he'd lost several opportunities to repeat business and referrals because he wasn't staying in touch.

Frustrated, David decided to block out one hour every Tuesday morning to follow up with past clients. He used this time to send personalized messages, share market updates, and schedule catch-up calls. Within weeks, his efforts paid off—a former client referred a friend looking to sell a property.

By dedicating time consistently, David turned follow-up into a habit that drove sustainable growth for his business.

Tactical Breakdown

1. Why Timeblocking Matters

Timeblocking is the process of scheduling dedicated time for specific tasks to ensure they get done.

- **Consistency is Key:** Regular follow-up strengthens relationships and keeps you top-of-mind for clients.
- **Avoid Procrastination:** Without a set time, follow-up tasks can slip through the cracks amidst daily demands.

- **Maximize Efficiency:** A focused block of time ensures follow-ups are done thoroughly and without distractions.

2. Setting Up a Follow-Up Timeblock

Step 1: Choose a Weekly Time Slot

- Select a recurring time that works best for you (e.g., Monday mornings or Friday afternoons).
- Block out 1-2 hours on your calendar and treat this time as non-negotiable.

Step 2: Prepare Your Follow-Up List

- Use a CRM or spreadsheet to organize your client database.
- Prioritize contacts based on recent interactions, milestones, or upcoming anniversaries.

Step 3: Plan Your Follow-Up Activities

During your timeblock, focus on high-impact activities:

- **Personalized Messages:** Send emails, texts, or handwritten notes.
- **Check-Ins:** Call clients to ask how they're doing and offer market insights.
- **Milestone Celebrations:** Recognize important dates like home purchase anniversaries.
- **Value-Added Content:** Share neighborhood updates or tips on home maintenance.

3. Staying Consistent with Timeblocking

Avoid Distractions:

- Turn off notifications and inform your team that this time is dedicated to follow-up.
- Use a timer to stay focused and efficient.

Leverage Tools:

- Use your CRM to set reminders for key dates and track follow-up progress.
- Automate some tasks, like scheduling emails, to streamline your process.

Review and Adjust:

- At the end of each month, evaluate your timeblock's effectiveness.
- Adjust the duration or frequency based on your workload and results.

4. How Follow-Up Drives Repeat Business and Referrals

Repeat Business

- **Stay Top of Mind:** Regular communication ensures clients think of you for future transactions.
- **Build Trust:** Continued support demonstrates your commitment to their long-term success.

Referrals

- **Encourage Advocacy:** Clients are more likely to refer you if you've maintained a strong relationship.
- **Create Opportunities:** Use your follow-up time to remind clients of your referral program or ask for testimonials.

Timeblocking is a simple but powerful strategy to ensure consistent client follow-up. By dedicating a set time each week, you can nurture relationships, secure repeat business, and generate referrals. The key is to treat this time as a critical business task and stay disciplined in honoring your schedule.

Block your follow-up time during your peak energy hours (e.g., morning for most people) to ensure you're fully focused and engaged.

Don't let follow-up time become reactive. Avoid using this timeblock to address new tasks or unrelated activities. Stay committed to your outreach goals.

- REN Success System/ Growth CEO - Resources

1. **Set a timeblock to follow-up with past clients specifically to ask for referrals.**
2. **Use REN CRM 2.0 to organize your client list, helping you prioritize those who are most likely to refer new business.**
3. **Use REN AI Assistant to plan weekly activities for this organized list. Prepare personalized messages, schedule calls, and identify milestones to celebrate.**

By making follow-up a timeblocked priority, you'll build stronger relationships, generate more referrals, and create a sustainable foundation for success in real estate.

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CHAPTER 26

Solving Client Issues

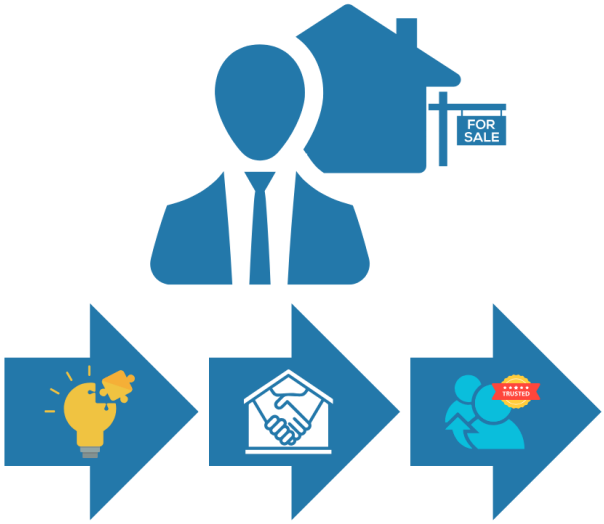
CHAPTER 26: Solving Client Issues

"The way you handle a problem often matters more than the problem itself."
— Anonymous

Big Idea

In real estate, challenges are inevitable. Whether it's a delayed inspection, financing issues, or a disagreement between buyers and sellers, your ability to solve client problems quickly and effectively strengthens trust and cements your reputation as a professional who **goes above and beyond.**

Story



Melissa, a seasoned real estate agent, was helping a young couple buy their first home. Everything seemed on track until a last-minute issue with the home inspection revealed significant repairs were needed. The couple, understandably upset, considered walking away from the deal.

Instead of panicking, Melissa calmly reassured them and quickly organized a meeting with the sellers to negotiate a solution. She helped the sellers agree to cover the repair costs and connected the buyers with trusted contractors to expedite the process. The deal closed successfully, and the couple later referred two of their friends to Melissa, praising her problem-solving skills and dedication.

Tactical Breakdown

1. Understanding Client Issues

Common Challenges in Real Estate:

- Financing Issues: Mortgage pre-approvals falling through or delayed.
- Inspection Problems: Unexpected repairs or safety concerns.

- Communication Gaps: Misunderstandings between clients, agents, or other parties.
- Emotional Stress: Clients feeling overwhelmed by the process or decision-making.

The Importance of Empathy:

- Acknowledge the client's frustration or concerns without dismissing their feelings.
- Example: "I understand how stressful this must feel. Let's work together to find a solution."

2. Solving Problems Effectively

Step 1: Stay Calm and Professional

- Maintain a calm demeanor to reassure the client.
- Example: "We've encountered a bump in the road, but I'm confident we can resolve this together."

Step 2: Gather All the Facts

- Understand the issue from all perspectives before offering solutions.
- Ask clarifying questions to get to the root of the problem.

Step 3: Develop Solutions

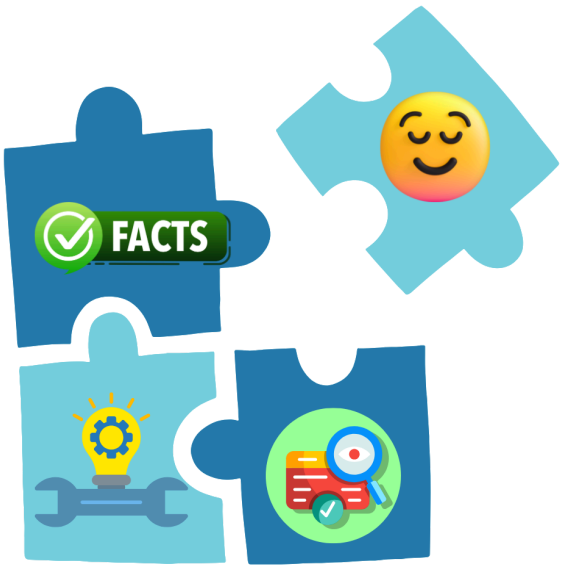
- Present multiple options whenever possible.
- Example: For an appraisal issue, suggest renegotiating the price or asking the lender for a second opinion.

Step 4: Communicate Transparently

- Keep the client informed throughout the resolution process.
- Use clear, concise language to avoid confusion.

Step 5: Leverage Your Network

- Utilize your relationships with inspectors, contractors, lenders, or attorneys to address issues efficiently.



3. Proactive Strategies to Prevent Issues

Set Clear Expectations:

- Ensure clients understand the process, potential challenges, and timelines.
- Example: Explain what a home inspection covers and the possible outcomes upfront.

Maintain Strong Communication:

- Provide regular updates to avoid surprises or misunderstandings.
- Example: “The lender is reviewing documents now; I’ll check in with them tomorrow and let you know if there’s an update.”

Stay Organized:

- Use tools like CRMs or project management apps to track key dates and tasks, minimizing oversight.

4. Managing Difficult Clients

Listen Actively:

- Let the client fully express their concerns before responding.
- Paraphrase their concerns to ensure they feel heard.

Be Solution-Oriented:

- Avoid blaming others or dwelling on the problem. Focus on what can be done next.

- Example: “This is an unexpected situation, but here’s what we can do to move forward.”

Set Boundaries:

- If a client becomes overly demanding or disrespectful, calmly reestablish professional limits.

5. Turning Problems into Opportunities

Reframe Challenges:

- Use issues as opportunities to demonstrate your expertise and dedication.
- Example: A quick resolution to a financing problem can showcase your resourcefulness.

Build Trust:

- Handling problems effectively reassures clients that they’re in good hands.
- Example: A seller who appreciates your negotiation skills may refer you to other potential clients.

SUMMARY

Solving client issues is a critical skill for real estate professionals. Challenges can arise at any stage of the process, but staying calm, gathering facts, and offering proactive solutions ensures that you not only resolve the issue but also strengthen client trust and loyalty.

PRO TIP

Keep a “solutions toolbox” of trusted professionals—inspectors, lenders, contractors, attorneys—to call upon when resolving common issues.

WARNING

Avoid ignoring or minimizing client concerns. Even small issues can escalate if they aren't addressed promptly and empathetically.

1. ***Never Split the Difference* by Chris Voss:** A guide to negotiation and conflict resolution.
2. **Local Vendor Network:** Build relationships with contractors, inspectors, and attorneys to help with quick problem resolution.
3. **CRM Systems:** Tools like Salesforce or Monday.com to track client needs and monitor progress.
4. REN Success System/ Growth CEO - Resources

1. **Use REN AI Assistant to create a problem-solving checklist specific to your niche. This will help you outline the steps to take when issues arise, ensuring a consistent and organized approach.**

2. **Build a network of reliable professionals to assist with common real estate challenges. Your vendor partners are a great place to start.**

3. **Use REN AI Assistant to come up with scripts to help you roleplay scenarios with common client concerns. Practice with your team!**

By mastering problem-solving, you'll not only navigate challenges with ease but also turn them into opportunities to showcase your professionalism and dedication, building stronger relationships with your clients.

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CHAPTER 27

Cross-Selling and Upselling

CHAPTER 27: Cross-Selling and Upselling

"The key to growth is not just getting new customers, but expanding the value of existing ones." — Unknown

Big Idea

Cross-selling and upselling are powerful strategies to increase the value of each client interaction. By understanding your clients' needs and presenting complementary or enhanced offerings, you can create win-win opportunities that benefit both the client and your business.

Story

When Tom, a real estate agent, helped a family buy their first home, he thought the transaction was complete. Months later, while chatting with the clients, they mentioned struggling to find a reliable property manager for their rental property. Tom realized he had missed an opportunity to offer additional services.

Determined to improve, Tom started paying closer attention to his clients' broader needs. During property tours, he began mentioning home warranty services, landscaping recommendations, and even financing partnerships. Not only did his clients appreciate the added value, but Tom also created new revenue streams through partnerships and repeat business.

Tactical Breakdown

1. Understanding Cross-Selling and Upselling

What is Cross-Selling?

Offering related or complementary services that enhance the client's primary purchase.

- **Example:** Suggesting home insurance or a property manager to a buyer.

What is Upselling?

Encouraging clients to choose a higher-value option that better meets their needs.

- **Example:** Presenting a home with upgraded features that align with their lifestyle.

2. Benefits of Cross-Selling and Upselling

- **Enhanced Client Satisfaction:** Offering tailored recommendations shows you understand their needs.
- **Increased Revenue:** Expanding the scope of each transaction boosts overall profitability.
- **Stronger Relationships:** Clients view you as a trusted advisor rather than just a salesperson.

3. Effective Cross-Selling Strategies

Listen for Needs Beyond the Transaction

- Ask probing questions to uncover additional challenges or goals.
- Example: “Are you planning to rent out this property, or will it be your primary residence?”

Offer Relevant Services

- Present options that naturally complement their purchase.
- Example: “Since you’re buying a larger home, have you considered working with an interior designer?”

Leverage Partnerships

- Collaborate with service providers to offer value-added services.
- Example: Referring a trusted contractor for remodeling projects.

Timing Matters

- Introduce cross-selling opportunities during natural points in the process.
- Example: After closing, suggest a home warranty plan to protect their investment.

4. Mastering Upselling

Understand Client Motivations

- Know what features or upgrades matter most to them.
- Example: A client focused on sustainability might appreciate homes with energy-efficient upgrades.

Showcase Value, Not Just Price

- Highlight how the higher-value option aligns with their goals.
- Example: “This home has a larger backyard, which might be perfect for the garden you mentioned.”

Use Testimonials and Examples

- Share stories of other clients who benefited from similar upgrades.

Be Subtle, Not Pushy

- Present options as helpful suggestions, not hard sells.

5. Common Cross-Selling and Upselling Opportunities in Real Estate

- **For Buyers:**
    - Home warranty plans.
    - Landscaping or home improvement services.
    - Local service providers (e.g., movers, cleaners).
- **For Sellers:**
    - Staging or photography services.
    - Pre-inspection reports.
    - Marketing upgrades, such as video tours or social media promotions.
- **For Investors:**
    - Property management services.
    - Rental analysis tools.
    - Access to off-market listings.

6. Avoiding Pitfalls

Don’t Overwhelm Clients

- Too many suggestions can dilute your message. Focus on the most relevant options.

Maintain Authenticity

- Only recommend services or upgrades that genuinely benefit the client.

Respect Boundaries

- If a client declines an offer, don't push further. Leave the door open for future discussions.

Cross-selling and upselling are not just about increasing revenue—they're about delivering more value to your clients. By identifying opportunities to offer complementary services or enhanced options, you strengthen relationships, build trust, and position yourself as a comprehensive resource for all their real estate needs.

Keep a curated list of trusted vendors and partners for cross-selling opportunities. Clients appreciate referrals to professionals who have been vetted for quality and reliability.

Avoid appearing overly sales-focused. Clients will sense if your suggestions are purely profit-driven rather than aimed at meeting their needs.

1. *Upselling Techniques That Work* by Brian Tracy: Insights on persuasive selling.

2. Real estate CRM tools for tracking client preferences and offering personalized recommendations.
3. Vendor partnership templates for formalizing relationships with service providers.
4. REN Success System/ Growth CEO - Resources

1. **Review your client's needs after every interaction. REN AI Assistant can help you identify potential cross-selling or upselling opportunities based on their wants and must-haves.**

2. **Lean on your vendor partnerships. Local service providers offer easy value-added referrals, benefitting both you and your client.**
3. **Use REN AI Assistant to develop scripts and refine your approach. You don't want to come across as insincere or only focused on the sale.**

4. **Use your Sales & Marketing tracker to track the results: how often do cross-sell or upsell opportunities lead to client engagement or increased revenue?**

By mastering cross-selling and upselling, you expand the value of each client relationship, turning every transaction into a gateway for deeper trust, satisfaction, and

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CHAPTER 28

Client Experience

CHAPTER 28: Client Experience

"The client experience is the foundation of loyalty, referrals, and long-term success." — Anonymous

Big Idea

A superior client experience is the cornerstone of a successful real estate business. By prioritizing every interaction, understanding client needs, and exceeding expectations, you create loyal advocates who drive repeat business and referrals.

Stats

- **35-50% of sales** go to the vendor who responds **first**.
    - AI-powered tools like chatbots and automated follow-ups can reduce response times to **under 5 minutes**, helping agents engage leads faster and stay ahead of the competition. (*InsideSales.com*)
- **71% of consumers** expect personalized interactions from businesses.
    - AI tools analyze buyer data to tailor listings, recommendations, and communications, improving lead-to-client conversion rates by up to **40%**. (*McKinsey and Salesforce*)
- Agents spend **40% of their time** on repetitive tasks like lead follow-up and answering FAQs.
    - AI automates these tasks, ensuring **consistent communication** and freeing agents to focus on higher-value activities like closing deals. (*NAR*)

Story

Sophia prided herself on being a knowledgeable real estate agent, but her approach focused primarily on closing deals. While her transactions were steady, she noticed her clients rarely returned or referred her to others.

Sophia decided to overhaul her process, focusing on the client experience. She began sending personalized updates, celebrating milestones like closing anniversaries, and providing thoughtful touches like a welcome basket for new homeowners. Within a year, her referrals doubled, and her clients started returning for future real estate needs.

Sophia realized that creating memorable experiences mattered just as much as her expertise.

Tactical Breakdown

1. Why Client Experience Matters

The Impact of Client Experience

- **Builds Trust:** Positive interactions create confidence in your professionalism.
- **Drives Loyalty:** Clients are more likely to return if they feel valued and understood.
- **Generates Referrals:** A great experience motivates clients to recommend you to others.

Key Components of a Great Client Experience

1. **Personalization:** Tailor every interaction to the client's specific needs and preferences.
2. **Communication:** Keep clients informed at every stage of the process.
3. **Empathy:** Understand their concerns and emotions, especially during stressful decisions.
4. **Consistency:** Deliver high-quality service from start to finish.

2. Designing the Client Experience

The Journey from Start to Finish

1. **Initial Contact:**
    - **First Impressions Matter:** Be warm, approachable, and professional.
    - Example: "Thank you for reaching out! I'd love to learn more about your real estate goals."
2. **Discovery Phase:**

    - **Understand Their Needs:** Ask questions about their priorities, timelines, and concerns.
    - Example: “What’s the most important feature you’re looking for in a new home?”
3. **Active Search or Sale:**
    - **Proactive Updates:** Keep clients informed about new listings, showing feedback, or market trends.
    - Example: Send weekly emails summarizing recent developments.
4. **Transaction Management:**
    - **Streamline Processes:** Ensure inspections, appraisals, and contracts are handled efficiently.
    - Example: Use a checklist to keep the client updated on next steps.
5. **Closing:**
    - **Celebrate the Moment:** Mark the occasion with a small gift or personalized note.
    - Example: “Congratulations on your new home! It was an honor to be part of this journey.”
6. **Post-Transaction:**
    - **Stay in Touch:** Schedule periodic follow-ups to check in and provide value.
    - Example: Send an annual home valuation or reminders about local events.

3. Enhancing the Client Experience

Tips for Memorable Interactions

1. **Be Proactive:**
    - Anticipate questions or concerns before the client brings them up.
    - Example: “Here’s a guide to help you prepare for the home inspection process.”
2. **Personal Touches:**
    - Add thoughtful gestures, such as a personalized thank-you card or a neighborhood guide.
    - Example: A “Welcome Home” basket with local treats and a handwritten note.
3. **Use Technology:**
    - Leverage tools like CRM platforms to automate communication while keeping it personalized.
4. **Handle Problems Gracefully:**
    - If issues arise, address them calmly and focus on solutions.
    - Example: “I understand the delay is frustrating. Here’s how we’re resolving it.”

4. Measuring the Client Experience

Gathering Feedback

- Use surveys or direct conversations to understand what clients loved and where you can improve.
- Example: “How would you rate your experience with us, and what could we have done better?”

Key Metrics

- **Client Satisfaction Score (CSS):** Measure overall happiness with your service.
- **Referral Rate:** Track how many clients recommend you to others.
- **Repeat Business:** Monitor how often past clients return.

5. Avoiding Common Pitfalls

Inconsistent Communication

- Clients may feel neglected if updates are infrequent or unclear.

Overpromising and Underdelivering

- Be realistic about timelines, processes, and outcomes.

Ignoring Post-Sale Follow-Up

- Maintaining contact after the sale is critical for long-term relationships.

Client experience is more than just a transaction—it's about creating lasting impressions and relationships. By focusing on personalization, proactive communication, and thoughtful touches, you can build trust, drive loyalty, and inspire clients to become your biggest advocates.

Create a client experience checklist to ensure consistent, high-quality service at every stage of the journey.

Avoid taking a "one-size-fits-all" approach. Every client is unique, and personalization is key to a memorable experience.

1. *The Experience Economy* by B. Joseph Pine II and James H. Gilmore: A guide to creating standout customer experiences.
2. CRM Platforms: Tools like HubSpot or Salesforce to track and enhance client interactions.
3. Client Feedback Tools: Platforms like SurveyMonkey or Google Forms for gathering insights.
4. REN Success System/ Growth CEO - Resources

1. **Use REN Pipelines to set up key stages, statuses, and triggers for clients.**

2. **Use REN AI Assistant to develop personalized nurturing campaigns and check-ins for current clients. This includes asking for input that you can use to refine your selling/follow-up processes, as well as the overall client experience.**

3. **Use REN CRM 2.0, REN Direct Mail, and REN Gifting to set up long-term campaigns to celebrate milestones such as closing dates, anniversaries, and birthdays.**

By prioritizing the client experience, you create a business rooted in trust, satisfaction, and long-term success. Happy clients not only return but also bring others with them, ensuring your continued growth in the real estate market.

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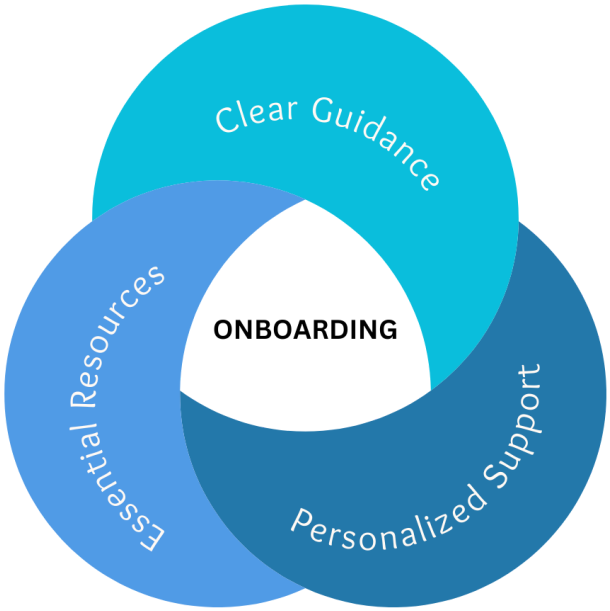
CHAPTER 29

Onboarding

CHAPTER 29: Onboarding

"A strong start sets the tone for success."
— Anonymous



Big Idea

Onboarding is a critical process for setting up new clients or team members for success. By providing clear guidance, personalized support, and essential resources, you create a smooth and welcoming transition that establishes trust, boosts confidence, and lays the foundation for long-term success.

Story

When Jason joined a real estate agency, he was excited about the opportunities ahead. However, the onboarding process was disorganized—no clear expectations, minimal training, and little guidance. Feeling lost and unsupported, Jason struggled to meet his goals and eventually left for another agency.

Contrast this with Mia, who joined a different agency and experienced a structured onboarding process. Within the first week, she received a welcome package, attended training sessions, and had a mentor assigned to her. Feeling prepared and confident, Mia quickly became a top performer. The difference? A thoughtful onboarding process.

Tactical Breakdown

1. The Importance of Onboarding

For Clients:

- **Builds Trust:** Clear guidance reassures clients that they're in capable hands.

- **Sets Expectations:** Establishes a shared understanding of the process and timelines.
- **Enhances Experience:** A seamless onboarding process starts the relationship on a positive note.

For Team Members:

- **Boosts Confidence:** New hires feel prepared to succeed.
- **Increases Retention:** Employees who are supported are more likely to stay.
- **Promotes Productivity:** Proper training and resources allow new hires to contribute quickly.

2. Onboarding Clients

Step 1: Initial Welcome

- **Welcome Kit:** Provide a personalized welcome email, informational guides, or a small gift.
- Example: “Welcome to our real estate family! Here’s a guide to what you can expect during this journey.”

Step 2: Set Expectations

- Outline the steps of the process, from initial meetings to closing.
- Example: Use a visual timeline to explain milestones like inspections, negotiations, and final paperwork.

Step 3: Provide Resources

- Share tools, such as financing calculators or neighborhood guides.
- Example: “Here’s a list of recommended lenders and a link to a property tax estimator.”

Step 4: Establish Communication Channels

- Clarify how and when you'll communicate (e.g., weekly updates, text messages for urgent matters).
- Example: "I'll provide updates every Friday, and feel free to text me for any immediate questions."

Step 5: Check for Understanding

- Regularly confirm that the client understands the process and feels supported.
- Example: "Do you have any questions about the next steps?"

3. Onboarding Team Members

Step 1: Pre-Onboarding Preparation

- Prepare workstations, tools, and logins before the new hire's first day.

Step 2: First Day Essentials

- **Welcome Package:** Include items like branded materials, an employee handbook, and a personalized note.
- **Team Introduction:** Facilitate introductions to key team members and mentors.

Step 3: Training and Resources

- **Systems Training:** Provide tutorials on CRM platforms, marketing tools, and other software.
- **Market Insights:** Share data about the local market and target demographics.
- **Role-Specific Skills:** Tailor training to their position, such as negotiation tactics for agents.

Step 4: Set Clear Goals

- Establish short-term objectives to give new hires an immediate sense of purpose.
- Example: "Your goal for the first 30 days is to shadow 5 client meetings and complete our training modules."

Step 5: Ongoing Support

- Schedule regular check-ins to address questions and provide feedback.
- Assign a mentor or buddy for additional guidance.

4. Measuring Onboarding Success

Client Metrics:

- **Satisfaction Scores:** Use surveys to gauge how supported clients feel during onboarding.
- **Process Completion:** Measure how smoothly clients move through the initial stages.

Team Metrics:

- **Time to Productivity:** Track how quickly new hires start contributing effectively.
- **Retention Rates:** Monitor the number of employees staying beyond 90 days.
- **Feedback Scores:** Use feedback from new hires to improve the onboarding process.

5. Common Onboarding Pitfalls and Solutions

For Clients:

- **Pitfall:** Overloading them with information.
    - **Solution:** Deliver information in manageable stages.
- **Pitfall:** Lack of communication.
    - **Solution:** Set a regular communication schedule and stick to it.

For Team Members:

- **Pitfall:** Unclear expectations.
    - **Solution:** Define goals and roles from the start.
- **Pitfall:** Inadequate training.
    - **Solution:** Provide comprehensive training tailored to their role.

Onboarding is a pivotal step in building trust and confidence, whether for new clients or team members. By offering personalized support, clear communication, and structured guidance, you can create a positive first impression that sets the stage for long-term success.

Develop an onboarding checklist for both clients and team members to ensure consistency and quality in the process.

Don’t assume that onboarding ends after the first week. Follow-up touchpoints are essential for addressing concerns and reinforcing support.

1. Onboarding Tools: Platforms like BambooHR or Trainual for employee onboarding.
2. Welcome Kit Ideas: Guides for creating personalized client or employee welcome packages.
3. *The First 90 Days* by Michael Watkins: A practical guide to onboarding new hires effectively.
4. REN Success System/ Growth CEO - Resources

1. **Use REN AI Assistant to design clear onboarding plans. Create separate plans for clients and new team members.**

2. **Use REN AI Assistant to develop welcome kits, guides, and any additional resources that will ease the onboarding process and eliminate confusion for new clients or team members.**

3. **Establish clear communication channels and set a schedule so new clients know when and how you're going to reach out.**

4. **Use REN AI Assistant to generate surveys to send out focused on how you can improve the onboarding process.**

By prioritizing a strong onboarding experience, you build trust, reduce stress, and set the stage for lasting relationships and productive team dynamics.

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CHAPTER 30

Client Follow-Up

CHAPTER 30: Client Follow-Up

"The difference between a good agent and a great one is what happens after the initial interaction."
— Anonymous

Big Idea

Client follow-up is the cornerstone of building trust, maintaining relationships, and driving repeat business and referrals. Consistent, personalized communication demonstrates your commitment to serving clients beyond the initial meeting or transaction, turning satisfied clients into lifelong advocates.

Story

Carlos, a real estate agent, used to believe that his job ended when a deal closed. He'd thank his clients, wish them well, and move on to the next lead. One day, he bumped into a past client who mentioned they had recently sold their home—but through another agent.

Carlos realized he had missed a golden opportunity. Determined to change, he started scheduling follow-ups with every client post-sale. He sent personalized messages, provided market updates, and remembered milestones like move-in anniversaries. Not only did Carlos win back old clients, but he also saw a surge in referrals. Follow-up had become his secret weapon for success.

Tactical Breakdown

1. Why Follow-Up Matters

Key Benefits of Consistent Follow-Up

- **Staying Top of Mind:** Keeps you in clients' thoughts for future transactions.
- **Addressing Concerns:** Provides an opportunity to clarify lingering questions or resolve issues.
- **Strengthening Relationships:** Builds trust and loyalty over time.
- **Generating Referrals:** Happy clients are more likely to recommend you to friends and family.

The Cost of Neglecting Follow-Up

- Missed opportunities for repeat business.
- Reduced client satisfaction due to lack of ongoing support.
- Lower referral rates from disengaged clients.

2. Follow-Up Strategies for Real Estate Clients

During the Transaction

- **Post-Meeting Check-In:** Follow up within 24 hours of a property showing or consultation.
    - Example: "Thank you for meeting with me today! Let me know if you have any additional questions about the property."
- **Regular Updates:** Keep clients informed about progress, such as negotiations or inspections.

Immediately After Closing

- **Closing Thank-You:** Send a personalized note or gift to celebrate the milestone.
    - Example: "Congratulations on your new home! I'm so grateful to have been part of your journey."
- **Survey Request:** Ask for feedback on their experience to identify areas for improvement.

Post-Sale Follow-Up

- **1-Month Check-In:** Ask how they're settling in and offer assistance.
    - Example: "I hope you're loving your new home! Let me know if you need any recommendations for local services."
- **Milestone Celebrations:** Recognize anniversaries or other significant dates.
    - Example: "Happy one-year anniversary in your home! Wishing you many more years of happiness."
- **Market Updates:** Share insights about neighborhood trends or home value estimates.

3. Tailoring Your Follow-Up Approach

Segment Your Client List

- **Active Buyers/Sellers:** Weekly or biweekly updates.
- **Recent Closings:** Monthly touchpoints for the first year.
- **Past Clients:** Quarterly updates or milestone-based communication.

Personalize Each Interaction

- Reference specific details about their transaction or personal preferences.
- Example: "I remember you loved the kitchen in your new home—how's it working out for you?"

Offer Value in Every Communication

- Share useful resources, like home maintenance tips, community events, or market insights.
- Example: "Here's a guide to winterizing your home—let me know if you have any questions!"

4. Tools for Effective Follow-Up

Customer Relationship Management (CRM)

- Use tools like REN 360, Salesforce, HubSpot, or Follow Up Boss to schedule and track follow-ups.

Email Marketing Platforms

- Automate newsletters or updates with platforms like REN CRM 2.0.

Personalized Reminders

- Use calendar alerts or task management apps to stay on top of follow-up schedules.

5. Measuring the Success of Your Follow-Up Efforts

Key Metrics to Track

- **Response Rate:** How often clients reply to your follow-ups.
- **Repeat Business:** Percentage of past clients returning for new transactions.
- **Referral Rate:** Number of new leads generated through client recommendations.
- **Client Satisfaction:** Feedback from surveys or conversations.

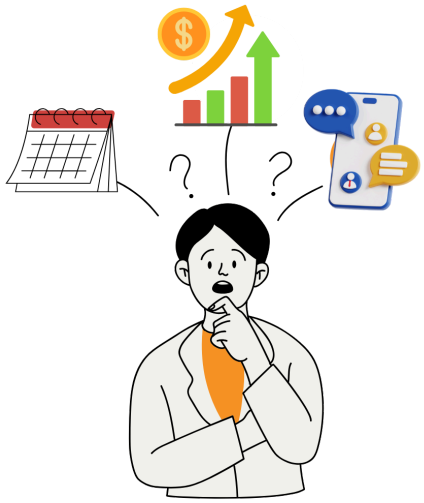
Adjusting Your Approach

- Analyze which follow-up strategies yield the best results and refine your methods accordingly.

6. Avoiding Common Follow-Up Mistakes

Being Inconsistent

- Clients may feel neglected if your communication is sporadic.
- **Solution:** Schedule regular follow-ups and stick to them.



Focusing Solely on Sales

- Overly sales-driven communication can feel impersonal and pushy.
- **Solution:** Balance sales messages with value-driven and relationship-focused touchpoints.

Generic Messaging

- Failing to personalize follow-ups can make clients feel unimportant.
- **Solution:** Reference specific details from past interactions.

SUMMARY

Follow-up is a critical yet often overlooked part of the real estate client journey. By staying connected, personalizing your approach, and offering consistent value, you can build lasting relationships, secure repeat business, and generate referrals that drive long-term success.

PRO TIP

Use a mix of communication channels—emails, calls, handwritten notes, and even social media—to diversify your follow-up efforts and keep clients engaged.

WARNING

Avoid overwhelming clients with excessive communication. Tailor your follow-ups to be timely, relevant, and spaced appropriately.

RESOURCES

1. *Fanatical Prospecting* by Jeb Blount: Insights on follow-up strategies that drive results.
2. Email Automation Tools: Platforms like Mailchimp or Constant Contact to simplify follow-up.
3. CRM Tools: Salesforce, HubSpot, or Zoho for tracking and organizing client interactions.
4. REN Success System/ Growth CEO - Resources

1. **Use REN AI Assistant to create a follow-up schedule. Design a timeline for post-meeting, post-closing, and long-term follow-ups focused on adding value and eliminating confusion specific to your niche.**

2. **If not already done, use REN CRM 2.0 and REN Pipelines to segment your client list, focusing on their status and follow-up needs.**

3. **Use REN AI Assistant to prepare valuable resources relevant to your client's needs. The more personalized these are to their pain points/motivations, the better.**

By mastering follow-up, you not only maintain strong client relationships but also create a steady stream of repeat business and referrals, ensuring long-term success in your real estate career.

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CHAPTER 31

Client Feedback and Improvement

CHAPTER 31: Client Feedback and Improvement

"Feedback is the breakfast of champions."
— Ken Blanchard

Big Idea

Client feedback is an invaluable tool for growth and success in real estate. By actively seeking, analyzing, and acting on feedback, you can improve your services, enhance the client experience, and build a business that evolves with your clients' needs.

Story

Emily, a real estate agent, prided herself on her ability to close deals efficiently. However, she started noticing a decline in repeat business and referrals. Determined to uncover the issue, Emily sent a short feedback survey to her past clients.

The responses were eye-opening: while her clients appreciated her expertise, many felt she was difficult to reach during the process. Taking this feedback to heart, Emily implemented regular communication updates and set clearer expectations about response times. Within months, she saw a noticeable improvement in client satisfaction and a surge in referrals. Feedback didn't just reveal a problem—it became the key to her growth.

Tactical Breakdown

1. The Importance of Client Feedback

Why Feedback Matters

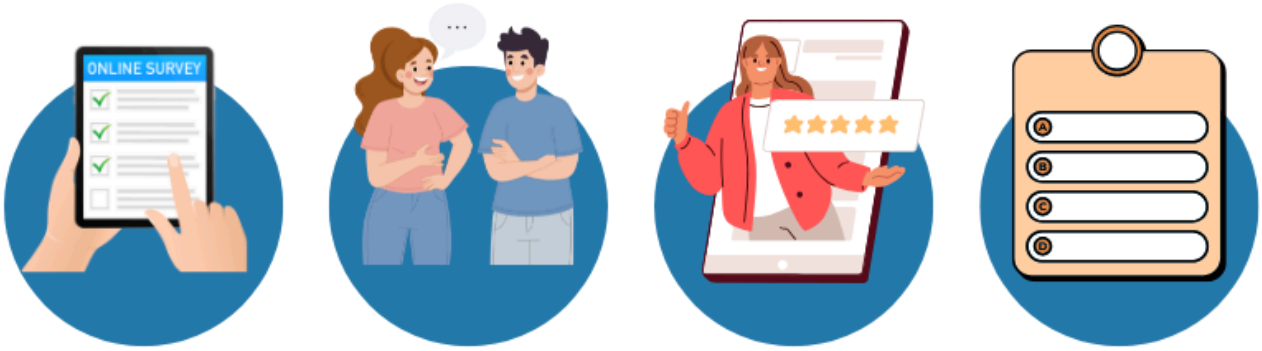
- **Identify Strengths:** Understand what clients value most about your services.

- **Spot Weaknesses:** Pinpoint areas where you can improve.
- **Enhance Loyalty:** Clients feel valued when their opinions are sought and acted upon.
- **Drive Innovation:** Feedback can inspire new strategies, tools, or approaches.

The Cost of Ignoring Feedback

- Missed opportunities for improvement.
- Declining client satisfaction and loyalty.
- Negative reviews or reputational damage.

2. Methods for Collecting Client Feedback



Surveys and Questionnaires

- Use tools like REN AI Assistant, Google Forms, Typeform, or SurveyMonkey to gather structured feedback.
- **Example Questions:**
    - “How satisfied were you with your overall experience?”
    - “What could we have done differently to improve your experience?”

One-on-One Conversations

- Schedule follow-up calls to ask for honest opinions.
- Example: “I’d love to hear your thoughts on how I could improve my services in the future.”

Online Reviews

- Encourage clients to leave reviews on platforms like Google, Zillow, or Yelp.

Social Media Polls and Comments

- Use social media to engage clients with quick polls or questions about their experience.

3. Analyzing Feedback for Improvement

Organize Feedback into Categories

- **Strengths:** Identify recurring positive themes (e.g., excellent communication).
- **Weaknesses:** Look for patterns in areas needing improvement (e.g., response times).
- **Suggestions:** Highlight actionable ideas for change.

Prioritize Actionable Insights

- Focus on feedback that directly impacts client satisfaction and business outcomes.

Separate Emotion from Data

- While negative feedback can be hard to hear, view it as an opportunity for growth.

4. Acting on Feedback

Address Common Issues

- If multiple clients mention the same challenge, prioritize resolving it.
- Example: “Clients have mentioned delays in updates, so I’m introducing weekly progress reports.”

Communicate Changes

- Let clients know you’ve acted on their feedback.
- Example: “Based on your feedback, I’m implementing a more detailed follow-up system to ensure better communication.”

Train Your Team

- Share feedback with your team to address weaknesses collectively.
- Example: Role-play scenarios to improve client interactions.

5. Building a Feedback Culture

Encourage Honest Feedback

- Reassure clients that their opinions are valued and won't impact your relationship.

Follow Up on Feedback

- After implementing changes, ask clients if they've noticed improvements.

Reward Participation

- Offer small incentives, like gift cards or discounts, for completing surveys.

6. Measuring Improvement

Key Metrics to Monitor

- **Client Satisfaction Scores (CSS):** Measure client happiness before and after implementing changes.
- **Repeat Business Rate:** Track how many clients return for new transactions.
- **Referral Rate:** Monitor the number of new clients referred by past clients.

Track Long-Term Trends

- Regularly compare feedback data to see if improvements are sustained over time.

7. Avoiding Common Pitfalls

Not Acting on Feedback

- Clients won't feel valued if their feedback is ignored.
- **Solution:** Commit to implementing at least one improvement based on feedback.

Relying on Limited Feedback

- Avoid basing decisions on input from only a few clients.
- **Solution:** Seek feedback consistently and from a diverse group of clients.

Overreacting to Negativity

- One negative comment doesn't require a complete overhaul.
- **Solution:** Look for patterns before making significant changes.

Client feedback is an essential tool for growth, offering insights into your strengths, areas for improvement, and opportunities to elevate your business. By collecting, analyzing, and acting on feedback, you can enhance client satisfaction, build loyalty, and drive long-term success.

Create a feedback loop by regularly following up with clients who provided suggestions, showing them how their input has shaped your business.

Avoid taking negative feedback personally. Use it constructively to improve your services and build a better client experience.

1. Feedback Tools: Platforms like SurveyMonkey, Typeform, or Google Forms for collecting feedback.

2. CRM Systems: Tools like Salesforce or HubSpot to track and organize client feedback.
3. *The Ultimate Question 2.0* by Fred Reichheld: A guide to leveraging client feedback to drive growth.
4. REN Success System/ Growth CEO - Resources

1. **Use REN AI Assistant to create surveys and questionnaires to gather structured feedback. Setup up your AI Assistant to take inbound calls, text, and chats.**

2. **Set up multiple feedback channels. This could include one-on-one conversations, business reviews, and even engagement over social media via polls and comments.**

3. **Use REN CRM 2.0 to email and text clients after key milestones to gather their thoughts. REN Direct Mail can also be used to send personalized postcards.**

4. **Use your Sales & Marketing Tracker to categorize responses. This will help you identify strengths, weaknesses, and give you actionable insights.**

By making client feedback a priority, you create a business that is responsive, adaptable, and continually improving, ensuring satisfaction and loyalty for years to come.

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CHAPTER 32

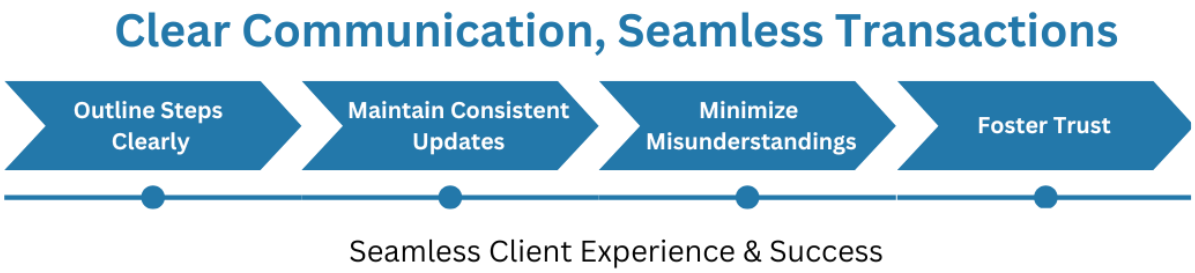
Client Communication & Action Plans

CHAPTER 32: Client Communication and Action Plans

"Clear communication is the foundation of trust and successful collaboration."
— Anonymous

Big Idea

Effective client communication and action plans are essential for keeping transactions on track, minimizing misunderstandings, and fostering trust. By clearly outlining steps and maintaining consistent updates, you create a seamless experience that reassures clients and sets the stage for success.



Story

When Amanda first started her real estate career, she frequently heard from clients that they felt “out of the loop.” Even though Amanda was diligently working behind the scenes, her lack of proactive communication left clients frustrated and anxious.

Determined to improve, Amanda implemented detailed action plans for each transaction and established a communication schedule. She sent regular updates, outlined clear next steps, and invited clients to ask questions. The result? Her clients became more confident and engaged, and Amanda’s business grew significantly through referrals praising her clarity and professionalism.

Tactical Breakdown

1. Why Client Communication Matters

The Role of Communication in Client Relationships

- **Builds Trust:** Transparency reassures clients that they're in capable hands.
- **Reduces Anxiety:** Proactive updates prevent clients from feeling neglected or uncertain.
- **Drives Efficiency:** Clear instructions minimize delays and ensure all parties are aligned.

Consequences of Poor Communication

- Frustration and confusion.
- Increased likelihood of errors or missed deadlines.
- Damage to your professional reputation.

2. Developing an Action Plan

What Is an Action Plan?

A step-by-step guide that outlines the key milestones, tasks, and timelines for a transaction.

Key Components of an Action Plan

1. **Timeline:** A clear schedule of important dates, such as inspections, financing deadlines, and closing.
2. **Milestones:** Key events in the transaction, such as submitting an offer or scheduling a showing.
3. **Responsibilities:** A breakdown of who is responsible for each task (agent, client, lender, etc.).
4. **Next Steps:** What the client should expect and prepare for in the coming days or weeks.

Example Action Plan

- **Week 1:**
  - Schedule property tours.
  - Client: Review pre-approval options with lender.
  - Agent: Share potential listings that match preferences.
- **Week 2:**

    - Conduct property tours and narrow down options.
    - Submit offer for selected property.

3. Effective Communication Strategies

Proactive Communication

- Provide updates before clients feel the need to ask.
- Example: “Hi Sarah, I wanted to let you know the appraisal is scheduled for Friday. I’ll update you as soon as we have the results.”

Set Expectations Early

- Outline how and when you’ll communicate during the process.
- Example: “I’ll send you a progress update every Monday, and you’re always welcome to call if you have questions.”

Use Multiple Channels

- Tailor communication methods to your client’s preferences (e.g., email, phone, or text).

Active Listening

- Ensure you understand client concerns by repeating their key points and asking clarifying questions.
- Example: “It sounds like you’re worried about the closing timeline. Let me check with the lender and get back to you.”

4. Tools for Streamlining Communication

Customer Relationship Management (CRM) Systems

- REN 360

Templates for Consistency

- Prepare email templates for common updates, such as inspection reminders or closing instructions.

5. Measuring Communication Success

Key Metrics to Track

- **Response Time:** How quickly you reply to client inquiries.
- **Feedback Scores:** Client satisfaction surveys focused on communication quality.
- **Completion Rates:** Percentage of tasks completed on time according to the action plan.

Adjusting Based on Feedback

- Use feedback to refine your communication style and improve clarity or frequency.

6. Avoiding Common Pitfalls

Overloading Clients with Information

- Too much detail at once can overwhelm clients.
- **Solution:** Break information into smaller, actionable pieces.

Inconsistent Communication

- Irregular updates can make clients feel neglected.
- **Solution:** Stick to a regular communication schedule.

Assuming Understanding

- Clients may not always grasp industry jargon or complex processes.
- **Solution:** Use simple, clear language and confirm understanding.

Effective communication and detailed action plans are critical to a smooth real estate transaction. By proactively keeping clients informed, setting clear expectations, and using structured plans, you foster trust, reduce stress, and enhance the overall experience.

End every client interaction with a recap of the next steps. This reinforces clarity and ensures everyone is aligned.

Avoid relying solely on written communication. Certain updates or sensitive issues are best handled through phone calls or face-to-face discussions.

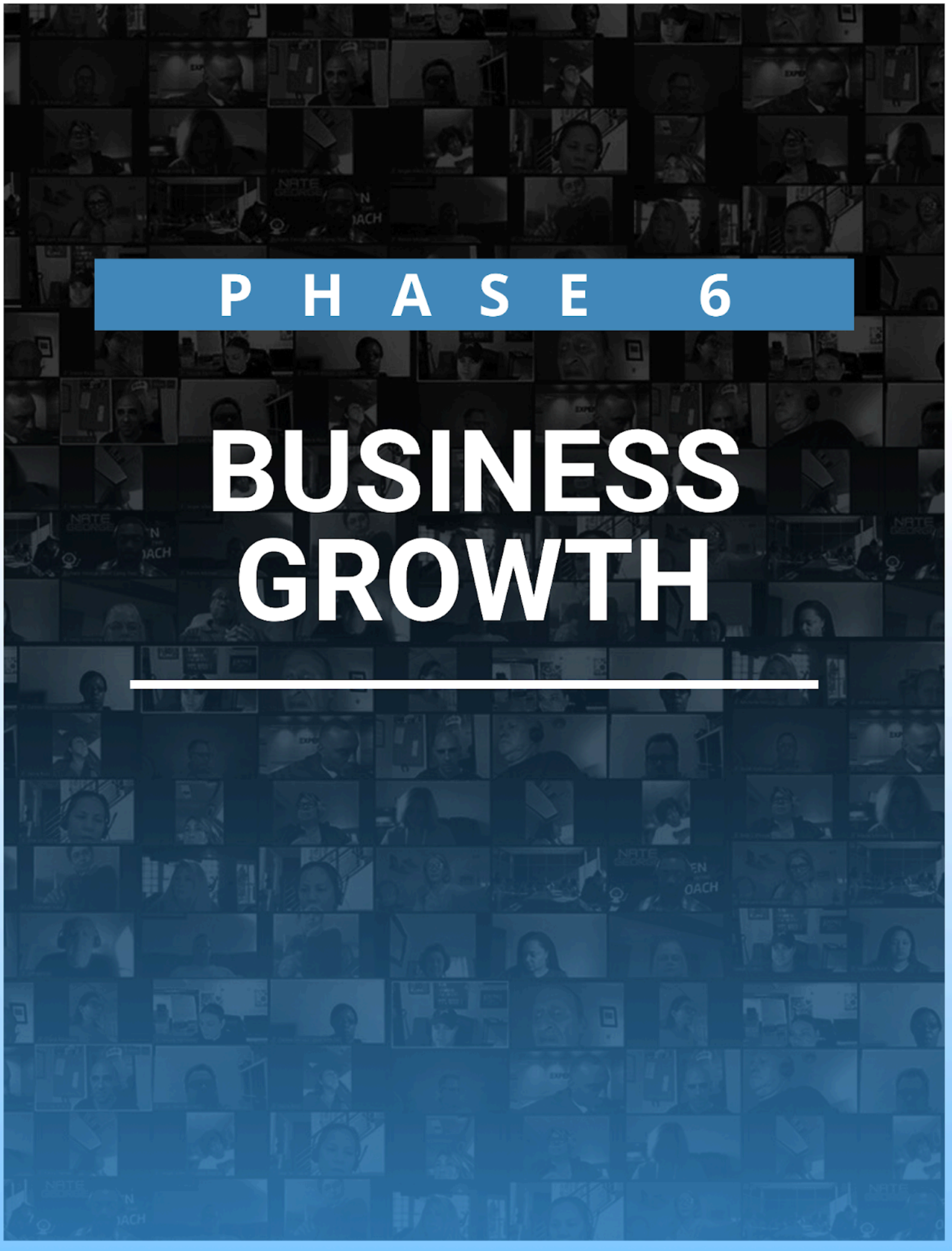
1. Communication Tools: REN 360.
2. *Crucial Conversations* by Patterson, Grenny, McMillan, and Switzler: A guide to effective communication in high-stakes situations.
3. Project Management Apps: Trello or Monday.com for collaborative action plans.
4. REN Success System/ Growth CEO - Resources

1. **Use REN AI Assistant to create a thorough communication plan. Focus on how often you'll update clients and the channels you'll use (REN Social Sphere can be used for social media, REN CRM 2.0 for email and text outreach, etc.)**

2. **Use REN AI Assistant to develop reusable templates for common transaction types (buying, selling, investing, etc).**

3. **Automate your action plan using REN CRM 2.0, REN Direct Mail, and REN Social Sphere to ensure nothing slips through the cracks.**

By mastering client communication and action planning, you can transform the real estate experience into a seamless, transparent, and enjoyable journey for your clients.



PHASE 6

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CHAPTER 33

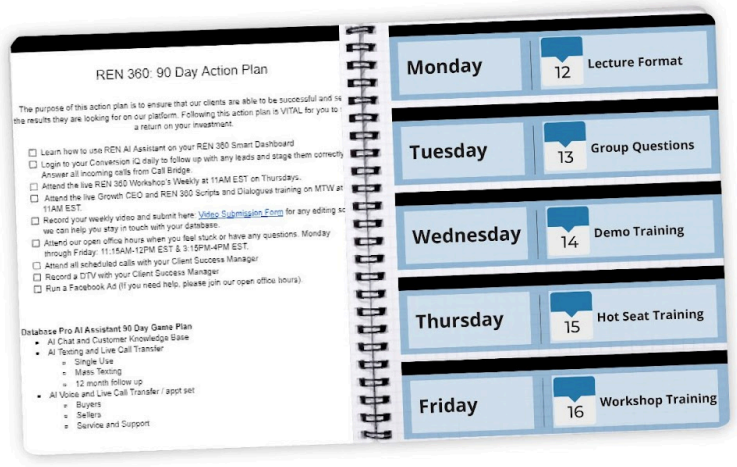
Team Building Secrets

CHAPTER 33: Team Building Secrets

***"Successful sales people are always learning. Always."* - Zig Ziglar**

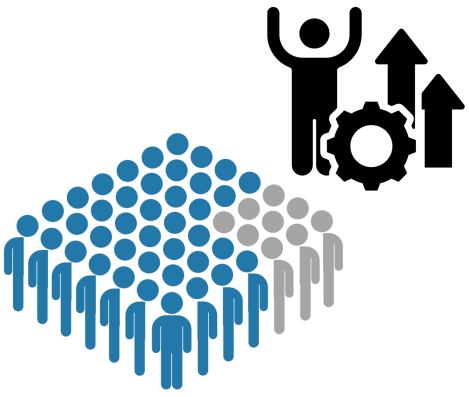
As good as you are, you are nothing without a great team. You have to be willing to do whatever it takes, including taking less pay for a time, providing good long term 3-5 year incentives, stock, rev share, great vacation benefits and more. Sales Agents need to see a clear path to 6-7 figures or they won't stay. The people that disservice keep them, the people that don’t get rid of them quickly because they will kill your culture.

Agenda • Timeframe • Format • Objective • Target Skill



"Successful sales people are always learning. Always." - Zig Ziglar

Importance of Training



One of my mentors, Chet Holmes, researched training and found that 10% of the population has a learning mindset; these are people who seek out and enjoy learning. **The other 90 percent of the population will not look to improve their skills unless they have to as part of their job requirement.** That’s a huge reason why many professions have mandatory continuous

education. Imagine if a doctor was not required to stay abreast of the medical advances over the years.

So here is how I view sales training: Woodcutter A cuts wood all day. Woodcutter B keeps stopping and sitting down. By day's end, woodcutter B has three times more wood than woodcutter A. Woodcutter A asks: "How could this happen? You were resting all day! Woodcutter B says: I wasn't resting. I was sharpening my saw."

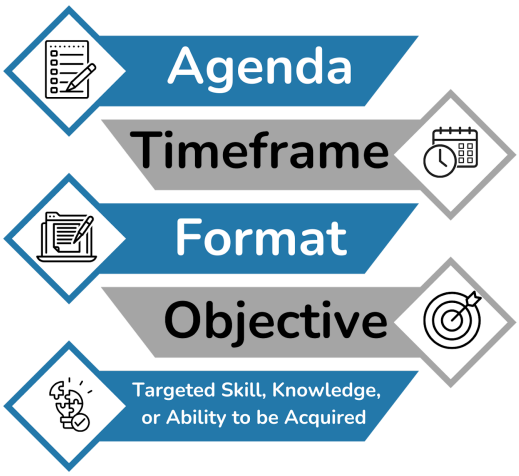
This principle will be incredibly important if agents transition from primarily working referrals to working with leads they don't know. The grim reality is that most real estate agents will never be able to maximize lead conversion without great training.

My Story - Training and Team Building

All our sales teams routinely participate in focused, planned training, which has radically improved all aspects of our business. Of course, you have a choice, but the agents in our network see a dramatic impact from plugging into our regular training, and they have their staff do the same through our webinars.

We run training every day from 8:00 a.m. to 9:00 a.m., covering the modules from this manual. We also run live mastermind sessions at 2:00 p.m. EST led by select agents from across the country who are crushing their FSBO and Expired conversion goals. We run the training sessions frequently because, as you know, repetition is the mother of all learning, while implementation is the father.

Here is how we organize our training sessions:

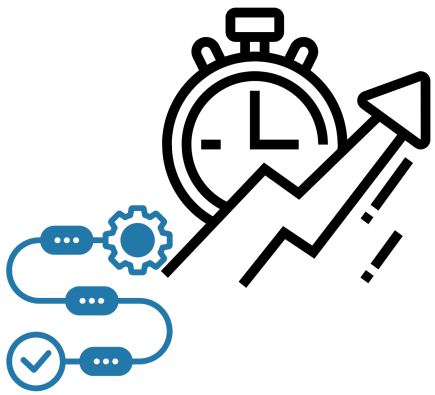


Running Effective Training Sessions

When people have a clear understanding of what they are about to hear and see, then they will be mentally prepared and focused for the training. Creating a training environment conducive to learning is important, so we try to make it fun.

Our training methods include:

- **Lecture format -** We talk, and you listen. My least favorite, but it serves a purpose when something is brand new.
- **Group Questions** - This is an opportunity for the audience to ask random questions
- **Group Discussion**- You pick the topic, and then there is an open group discussion with the team
- **Demonstration training**- the team leader or top performer demonstrates how the task should be performed.
- **Role Play** - This helps people automatically do what they know they should because it becomes second nature.
- **Hot Seats** -It's a drill down during role play where you repeatedly stop and restart every detail until they get everything practically perfect.
- **Case Studies** - we show examples where someone did something wrong but then chose to implement a particular strategy and how it affected their results. Then, you let them tell their story.
- **Technology training** - We train on technology. Most agents have great tools but never leverage them to their full capacity.
- **Workshop training -** We pick a specific area we want to improve, and then everyone contributes their ideas on improving that area.



The goal of your training should be to speed up the process from stage one of learning to stage two of learning as fast as possible.

Outside of training there are other factors in keeping top talent. Here are the steps to ensuring you retain top talent. This could be the difference in building a 7- and 8-figure business, so follow the steps carefully and circle back to them often.

Compensation Plan

- If it's your client, you should ensure your agreement is clear and they understand the terms for clear expectations and how the guarantees work. A formal review of the compensation plan and expectations based on what you have agreed to is needed for recruiting. Expectations are everything, and you need to give them a clear 3 to 5-year picture of how things will get better for them if they perform.
- It's also important to make sure your splits are set up for profitability while still being competitive. Splits should only get better from that point based on performance.

A 90 Day action plan

- Make sure you have a clear plan of action for your client or your new hire
    - "REN, Help me develop a 90-day action plan for my ___ in the ___ industry"
    - "REN, Where do I find the recommended 90-day action plan for ____."

One-on-One Meetings

- For any high ticket sales, you should have an agreed meeting date and time for follow-up, and the same goes for meeting with your new hire. Have a checklist of what you will cover in the meeting so you look like a pro and make the time valuable. Once a week or every other week is recommended.

Show Off Success

- At every chance, show off your success and progress with your team and your business plan. This brings in more talent when you do this and shows you appreciate your talent.

Tackling the Lifetime Value of Agent's Profitability

- It's important to know and think about maximizing the lifetime value of an agent. You can maximize that through referrals, repeat business, and provide a great experience so they stay with you and keep coming back.

Break your training topics up by week of the day. Pipeline review Monday, Prospecting Strategies Tuesday, Presentations skills Wednesday, Handling Objections and Negotiation Thursday, Client Care and Referrals Friday.

If you don’t train regularly you should find a coaching program that can help you train.

Check out our recommended A.I. tools and services for increased productivity.

- Hyper Sales Growth - Jack Daly
- Sales Management for Dummies - Butch Bellah
- 7 Secrets of building Elite Sales teams - Diane Polnow
- Sales Leadership - Colleen Stanley
- Use the Ren A.I. Sales Coach to Help you coach your sales teams and create an Elite Sales team.
    - REN Success System/ Growth CEO - Reso...

1. **Determine which training methods will be the most effective for your team. This could take some time, so make sure you try out a few of them and see which seems to be having the biggest impact.**

2. **Use REN AI Assistant to create or improve compensation plans.**

3. **Use REN AI Assistant to create a 90-day action plan for new team members. This should clearly lay out expectations and focus on key milestones and improvements.**

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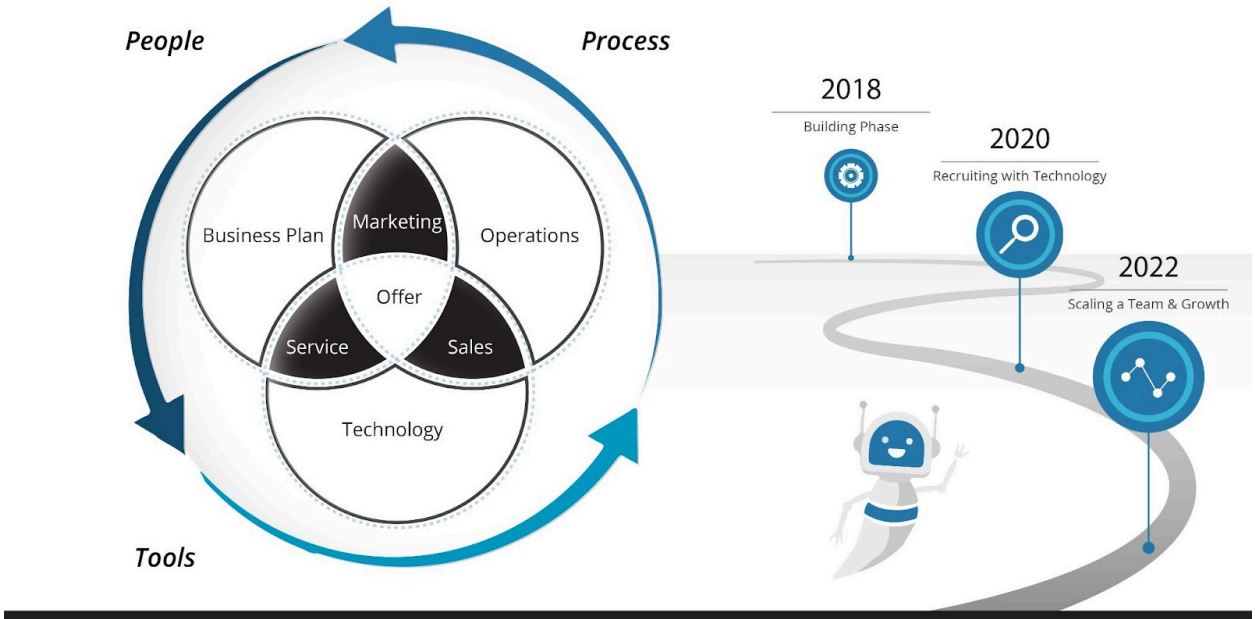
CHAPTER 34

Agent Attraction Secrets

CHAPTER 34: Agent Attraction Secrets

"Hiring is like dating. You want to find someone you can spend a lot of time with." - Ben Horowitz

Attracting top sales talent to your team is arguably the most important skill to master if you're aiming to scale a seven or eight-figure business. This holds true whether you're in real estate or any service industry. The key questions are how to attract them, what compensation should look like, how to set and meet expectations, and how to retain talent over the long term. The answer lies in applying the same strategies you learned in the lead generation and lead conversion sections, adjusting them to fit your target audience in the talent acquisition process.



The Strategy

Going back to the business flywheel, you need three things to support your recruiting efforts:

1. The right technology: This empowers your team to attract and manage candidates efficiently.
2. Lead generation strategies: Define how you'll attract potential agents to your brokerage.

3. Best practices in conversion and retention: Implement strategies to convert leads into successful hires and retain them long-term.

By putting the right people, processes, and tools in place, you empower your team to succeed.

The good news is that if you take the time to do this correctly and follow this blueprint, recruiting will be significantly easier.

My Agent Recruiting Journey

My journey in agent recruitment began with excitement and a vision of building my team. Eager to step back from production, I believed finding capable individuals was my ticket to success. I started reaching out to people, passionately sharing why they should join my team, and some did. However, I soon realized I wasn't attracting the right people and couldn't understand why. I found myself attracting underperforming individuals or those with low ambition. It was a hard truth to accept, but I finally realized that I was making it all about me and my team, focusing on my vision, not on their goals. This realization was a turning point in my recruitment journey.

This realization prompted me to revamp my recruitment strategy. I reworked my message, my scripts, and how I managed my database. I honed my ability to understand different personality traits and discern between who we wanted to work with and who we didn't.

Once I had the system, I strategically hired a recruiter who had previously been an agent. Together, we embarked on a journey to recruit over 100+ inside and outside agents in the next three years. We saw our transaction volume grow, launched a referral program to attract more agents, and moved 1,000+ properties a year locally and nationwide. Here's a summary of how we did it.

The Tactical Breakdown:

For Teams and Brokerages looking to scale big, recruiting cannot be a side focus but the number one focus in your business. Therefore, you must set specific goals, measure those goals, and determine achievable, relevant, and time-bound goals. Incorporated into your marketing and sales budget needs to be agent attraction and you need to execute like you would with other marketing activities.

It's essential to track: Add these metrics to your sales and marketing tracker or create a new tab for tracking.

- Leads, Calls, contacts, appointments set, first appointments, second appointments, recruits, and referrals from other agents on the team.
- Create a recruiting dashboard/spreadsheet to track results on your sales and marketing spreadsheets.
- Time block your schedule to prioritize recruiting, make the calls, and do the marketing activities needed to hit the goals. If you focus your attention on recruiting and do the activities from 9-12 every day, you will be shocked at how quickly you scale your team. Setting a goal to make 20-40 contacts a day is what you should shoot for.
- The "if you build it, they will come" most likely will leave you missing your targets.
- Attitude, activity, and skill will determine whether or not you hit your goals.

Recruiting with Technology

Using technology is an important part of the recruiting process. You should always maintain a well-organized database of potential recruits.

Build levels of agents in your database that break your leads down by productivity.

  - 0-5
  - 6-15
  - 16-20
  - 21-40
  - 41+
  - Top 50 Agents

- Leverage all the same tools we recommend for your other marketing automation and tools to attract agents. Develop a strategy that helps you attract agents and build a sales and marketing calendar that enables you to follow through on those activities. Leverage email, text, video, social media, agent testimonials, and webinars to attract agents.
- Leverage AI and targeted marketing ads to recruit and build your brand alongside a social media publishing plan.
  - 7-10 emoji likes and reactions, 7-10 post comments, 7-10 post shares, or personal messages.

- Build a best-practices sales and marketing calendar to recruit extraordinary agents.

Unique Value Proposition and Offers:

- One of the most common recruiting mistakes is not building Unique Value Propositions (UVP) into your recruiting process. This could mean the difference between hitting your targets, attracting the right agents, and struggling to scale your business. With all the competition out there, you need to bring unique value.
- Leading with a "production-driven" UVP is crucial within your unique value. Traditional approaches put an enormous focus on commission splits, support, and culture. These are good, but you should focus on how your unique value will drive more productivity. Ensure all your recruiting and marketing materials speak the language of higher productivity.
- Use a consultative approach by helping prospects think about their goals and break goals down with them in the recruiting process. Find pain and motivation through a question-based recruiting process, then develop a plan to help them reach their goals. Don't explain how great you are; show them step-by-step how you can help increase their production.
- Write down all the things that add value to agents on your team and create a language that speaks to increased productivity.

- *"You will sell more real estate through our system…"*
- *"You will sell more real estate because of the technology we provide."*
- *"You will close more sales because of our daily online productivity coaching."*
- *"Our administrative staff will free up your time so you can focus on generating more business."*
- *" Our lead generation systems will help you build your pipeline and sell more real estate while you work and grow your SOI."*

Commission negotiation often arises when an agent feels that they do not receive enough value from a partnership. However, if an agent presents the right value, successful agents will pay the splits to get the support they need. Keep in mind that

commissions should only be a concern if you are not the right fit or do not offer enough value.

Targeting the right agents looks different for everyone because your goals may differ, and all agents have positives and negatives.

New Agents - Need a lot of training but are also full of energy and excitement, bring a new dynamic to your team

Low-Producing Agents - Can be negative and complain but are easier to recruit because they most likely don't blame themselves for their lack of productivity but their broker or team. If you are doing volume with your recruiting, this profile can help, but it can come with a lot of hassle. They are not recommended if you are building a high-performance team.

Good-Performing Agents—These agents are the ones you want. They have had some success but are still somewhat open to opportunities.

Top-Performing Agents - Mega agents and top agents take a lot of work and relationship building. Still, they can considerably impact the organization because of publicity and other agents watching their move.

When you are recruiting, it's also important to factor in their D.I.S.C. Profile.

Most teams make the mistake of looking for the perfect D.I.S.C. profile or putting too much weight on it. **The purpose of the D.I.S.C profile is to assist you in understanding how to communicate effectively with the people you work with or want to recruit. It is important to note that factors such as desire, attitude, and cultural fit are always intangible factors that you should prioritize over finding the perfect profile match.**

Profiles can help create a plan for the agent. Example: D-I type personality types might be more likely to prospect and see going after new business they don't know as a fun challenge, and rejections are just par for the course. S-C type personality types might be better off focusing on building their SOI, Networking, and developing a marketing system that will be hard for them to hit their goals in the short term, but it could greatly benefit them in the long term.

The ultimate goal is to have a system and structure that supports both and attracts agents who can help you in all aspects of your business. You need drivers and agents that want to cultivate relationships.

Cultivating a Top Talent Pipeline: Diverse Lead Generation Strategies for Real Estate Agents

Building a successful real estate team hinges on attracting qualified agents. Here's a breakdown of various lead generation strategies to consider:

1. Leverage Your Network & Referrals:

- **Harness the Power of Existing Relationships:** Announce your recruitment drive internally and offer incentives for successful referrals. This could include bonuses, rewards, or recognition programs.
- **Tap into Industry Connections:** Reach out to past clients, vendors, and industry professionals you've built relationships with. Encourage them to recommend qualified agents for your team.

2. Utilize Organic & Paid Social Media:

- **Showcase Your Culture & Success:** Share engaging content that reflects your company culture, highlights agent success stories, and showcases the benefits of joining your team.
- **Target the Right Audience:** Run targeted ads on platforms like LinkedIn and Facebook. Use demographics and interests to reach qualified agents actively seeking new opportunities.
- **Expand Your Reach:** Consider partnering with real estate influencers to amplify your message and attract a broader audience of potential agents.

3. Don't Neglect Traditional Methods: Job Boards

- **Increase Visibility:** Post your agent listings on relevant real estate job boards like ZipRecruiter or Indeed.
- **Cast a Wider Net:** Consider general job boards as well to reach a broader pool of candidates who might be interested in a career transition into real estate.

4. Partner with Real Estate Schools:

- **Connect with Emerging Talent:** Build relationships with local real estate schools to connect with graduating or pre-licensed agents eager to launch their careers.
- **Direct Interaction:** Attend career fairs hosted by these schools to directly interact with potential hires and answer their questions.

5. Cold Outreach:

- **Compelling Communication:** If compliant with local regulations, craft compelling email sequences or phone scripts targeting qualified agents. Highlight your brokerage's unique selling points and personalize your outreach to resonate with individual agents and their career goals.

6. Take Initiative with Events:

- **Showcase Your Culture:** Host open houses or information sessions specifically for potential agents. This allows you to showcase your company culture in a relaxed setting and answer their questions directly.
- **Network & Build Relationships:** Sponsor industry events to increase brand awareness and network with potential hires. Building relationships and fostering interest in your brokerage is key to attracting top talent.

7. In-House Recruiter (Optional):

- **Streamline the Process:** For high-volume recruiting, consider hiring an in-house recruiter to manage applications, conduct screenings, and schedule interviews. This frees up your time to focus on other aspects of building your team.

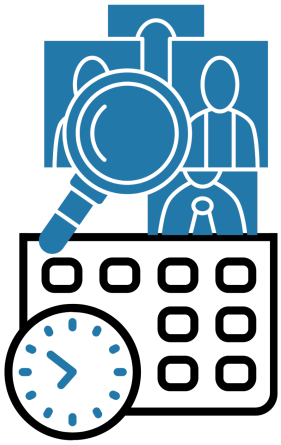
8. Partner with a Recruiting Company (Optional):

- **Access a Wider Talent Pool:** Partnering with a recruiting agency specializing in real estate can be a valuable asset. They can leverage their expertise and

expansive network to identify top-tier agents you might not have reached organically.

By implementing this diverse lead generation strategy, you'll attract a steady stream of talented agents seeking a thriving environment to launch or advance their real estate careers.

Setting Recruiting Appointments



As mentioned above, contacting the agent you're trying to recruit by phone is the single most powerful way to recruit and set appointments.

The goal is not to convince them to work with you on the initial phone call but to pique interest and set up a time to have a discovery conversation. So please don't get caught up pitching all the details on the first call. You will look desperate and they will not absorb what you're saying.

The same seven-step prospecting methodology applies to recruiting. You must:

1. Build Rapport
2. Qualify
3. Add Value
4. Create Doubt that they don't have the best
5. Close the Appointment
6. Handle any objections that may come your way

After the call, you can meet them in person or virtually. Some like to meet virtually first because it does not take as much time; you can meet in person if they are good prospects.

Our organization has recruited several people without even meeting them in person.

Remember: Base the conversation around production and how you are helping agents increase productivity.

In the scripting section, you will see several options to approach the initial call. You also need to make sure you memorize the top objections; after all, you will hear them repeatedly.

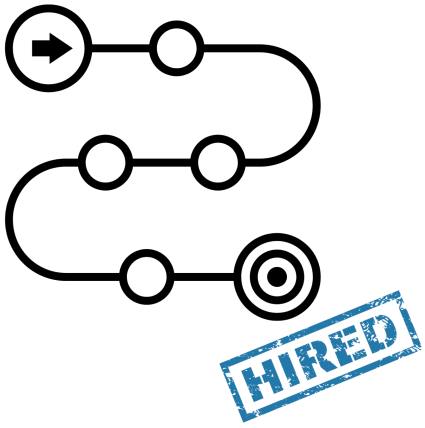
Just like real estate, *follow-up is everything*. You will get the majority of your recruits over time and consistent follow-up. Play the long game, and you will build a dynamic business.

Conducting Recruiting Appointments

- ➔ Appointment location varies depending on the model you use. If you work virtually, Zoom or some other meeting technology will work. But if you are meeting in person, try to meet at your office, if you have one, because it gives you the home-field advantage. They can better see your environment and build rapport than meeting in a different place.
- ➔ Plan on meeting for 30-45 minutes. It may go longer if there is interest, but your presentation/recruiting process must be to the point and show your benefits. Spend most of your time asking questions and then using that information to build a case for why you can help them increase their productivity.

The recruiting process can be broken down into stages:

Ask questions to find out needs - Like how a doctor diagnoses a patient, you're looking for needs you can fill. You're looking for motivation to make a change. Not rushing through this part is important because you must design your whole recruiting presentation around their goals. ***It's vital to let them do most of the talking, and you do most of the listening.***



Step 1

Get them talking about their past - try to capture their journey from job to job. Look for opportunities to build rapport with commonalities. (Questions to ask will be in the script section) (What did you do before? How long did you do it for? What did you like about doing that? etc.)

Step 2

Finding Opportunity - As you transition into presenting your value, it's first important to ask them how well their business is doing on a scale of 1-10. Then, ask them what would make it a 10. Take notes while they tell you. Be sure to try and draw out more by saying "what else" or "anything else." You need to try and get as much as possible. Be sure to reply and say, "OK, got it. That makes sense."

Step 3

Future Benefits - In this stage, it's important to make sure they have a clear picture of what it would be like to make those changes. It would affect their personal life, family, travel, kids' education, toys they want, and other ventures they want to get into. **Example: "So what happens when you make $300,000 a year?"**

Step 4

Future Pain - In this section, you want to ask them what happens if they don't make the changes and don't get their business to the 9-10 mark. Show them the power of increased productivity and how it will increase their income. Also, show them how lower income will affect their goals. When you find it appropriate, ask permission to suggest what could be done. This is the beginning of the coaching relationship.

Step 5

The Solution - The key is directly connecting the agent's needs to what you offer. For example**, i**f they need to work their database, explain how you can help them do that. If they need more leads, explain how you can help them do that. If they need coaching, tell them about your coaching. Ensure you always go back and increase their income and prevent them from missing out on what increased income can bring.

Step 6

Taking Action At this point, you need to help them realize the cost of action vs. inaction and paint a clear picture of what it would be like to work with your team. Example: "So what is important to you, risking not hitting that 10-mark or putting yourself in a position to hit the goals you described"? You want to get "yes" on important topics and move the conversation towards enrollment. Use the different closes listed in the section to start your closing cycle. The rule of thumb is to try and go through the process you presented early in this playbook three times. The best recruiters will get through as many cycles as it takes.

Step 7

Overcoming Objections—We will discuss closing details in the next section. In this step, it's important to identify exactly what is holding them back, isolate each objection, and continuously return to their pain and motivation. Eventually, you will become good at knowing what to say and how to say it. It takes practice but is well worth it in the long run.

Recruiting takes time, but these seven steps will help you shorten your time frames and increase your closing rates. Build your slides and presentation around this psychology; you will do exceptionally well. Then, run your process by other agents on the team to hear what they think.

Setting the Follow-Up

- You must leave the first meeting with an exact follow-up time. "I will call you next week" is not an appointment but more like a blow-off and indicates not much interest. Look at the follow-up scripts to help you with the language.
- Understanding that you might not close on the first appointment or event on the 2nd or 3rd, creating a mentoring/coaching relationship is important because you want to be there when deciding to move. Most agents move 3-5 times in their career, so the odds are they will be moving sooner than later.
- Providing them with great coaching materials and a step-by-step marketing plan will help them commit to working with you. Then, when they start seeing that you have a system in place, they will see you are the real deal and different from most. You can buy them a copy of this playbook and explain how they can get access to all the great coaching that goes along with it when they join.
- Other ways to add value are to invite them to review a behavior assessment and explain how their personality type should help them understand the best strategy to approach business. Tony Robbins offers a free DISC assessment they can take, and you can walk them through it. You can also invite them to attend the training sessions you and your coaching team run.

- The key is to try and provide customized value. The scripts and dialogs are built to help you have a proven track and conversational guild to recruit more agents faster.

Closing Recruits

- There are numerous closing scripts in the scripts section. The important thing is to learn to say the right thing at the right time and to pay attention to “signals.” If they start using language like “when” vs. “if,” they move, you know you're getting closer, and it becomes more about timing.
- Remember, it’s very easy to say no to someone else's agenda, but it’s tough to say no to your own goals. Often, people are not aware they have fallen into traps along the way that make them less productive, and we have the chance to help them fix that. It’s very rewarding and can be mutually beneficial if you decide to work together.
- The key to closing is to continually remind them of what they told you they know they should be doing and how you will help them do that.
    - Follow the three steps of closing:
        - Epiphany
        - Response
        - Close
- In the scripting section, we cover almost every scenario you will run into and give you the language to overcome objections along the way.

Creating a Growth Environment for Recruiting

You must create an environment for growth within your culture and team. IC&Co has worked hard to promote growth. If agents don’t feel they are getting support, learning, and networking with other great agents along the way, it can dramatically hurt their churn rate. Develop a 90-day fast-start game plan to keep them and great success stories on track. This will also help you ensure they are onboarding correctly by walking them through your game plan step by step. This playbook can help you do that.

Hire a recruiter. This sounds obvious, but if you don’t have someone dedicated to this process to help you, it’s going to be very difficult to ever get the momentum you need to build an awesome team. If budgets are a constraint, consider working with a recruiting company, a polished inside salesperson that you can work with, or anyone who can help you. If you have to tone down your lead gen budget, think of the

Consistent recruiting is crucial for the growth of your business. Failing to recruit on a regular basis poses the greatest risk to your business's continued success.

Login to your ren360 dashboard, go to ren university and you will find the Agent Attraction and Retention Tool kit. Also check out the A.I. Tools and Services for agent attraction.

- Hire: - Brian Icenhower
- Fanatical Recruiting - Jeb Blount
- REN Success System/ Growth CEO - Resources

1. **Set weekly recruiting timeblocks and use your Sales & Marketing Tracker to track leads, calls, appointments, recruits, and referrals.**

2. **Use REN CRM 2.0 and REN Pipelines to segment your agent database by productivity levels (e.g., 0-5, 6-15 deals/year).**

3. **Use REN Paid Ads to run targeted Facebook, Google, and LinkedIn ads, showcasing your production-driven Unique Value Proposition (UVP).**

4. **Use REN Social Sphere to post agent success stories, testimonials, and recruitment-focused content automatically.**

5. **Use REN CRM 2.0, REN Direct Mail, and REN AI Voice & Text to follow up with potential recruits via text, voice, and chat, setting discovery appointments automatically.**

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CHAPTER 35

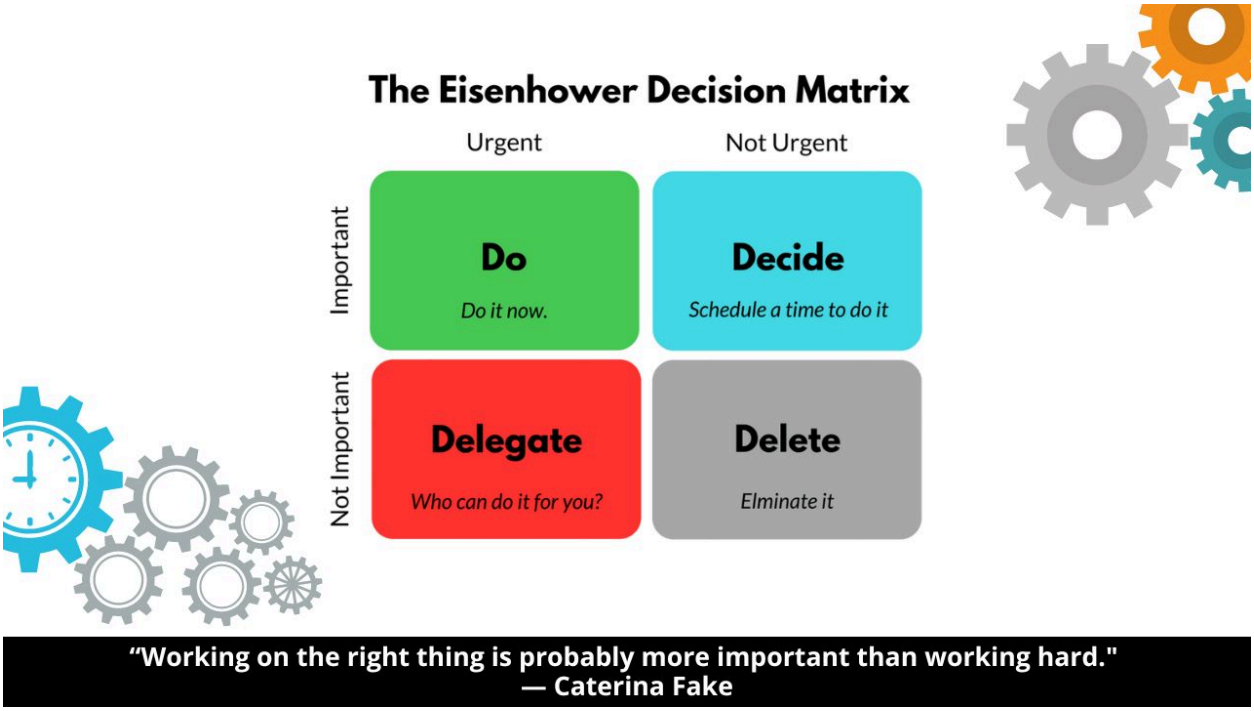
Productivity Secrets

CHAPTER 35: Productivity Secrets

"Working on the right thing is probably more important than working hard."
— Caterina Fake

More important than time management is what you're putting your energy into. Direct your energy toward activities with a multiplier effect; don't do anything else unless you enjoy it or it's a hobby. Effective prioritization is crucial in a world filled with distractions and a never-ending to-do list.

In this chapter we are going to go over not only our own work effectively, but to make sure you're working on the right things that will have the biggest impact on your business.



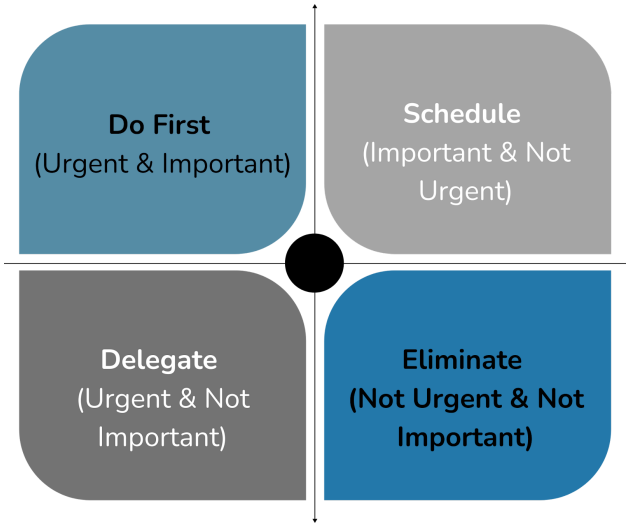
The Strategy

Do urgent tasks constantly hijack your day, leaving important goals languishing? If you answered yes, then welcome to the club! But there is a way to overcome this, there's a powerful tool waiting to be taken advantage of: **the Eisenhower Matrix**. This deceptively simple framework can revolutionize your productivity by teaching you to prioritize ruthlessly.

Developed from principles championed by Dwight D. Eisenhower, the 34th US president and a renowned leader known for his efficiency, the Eisenhower Matrix sorts tasks based on urgency and importance. By understanding these two factors, you can make informed decisions about how to handle each item on your plate.

The Four Quadrants of Productivity

Imagine a grid divided into four squares. On the horizontal axis lies urgency, encompassing tasks that demand immediate attention. The vertical axis represents importance, signifying activities that contribute to your long-term goals. Here's a breakdown of the four resulting quadrants:



- **Do First (Urgent & Important):** These are the critical tasks that can't wait. A looming deadline, a pressing client call, or a fire drill all fall into this category. Tackle them head-on and clear them from your mind.
- **Schedule (Important & Not Urgent):** This quadrant houses the activities that fuel your success but lack immediate pressure. Strategic planning, learning a new skill, or preventative maintenance all reside here. Block time in your calendar to ensure they get done.
- **Delegate (Urgent & Not Important):** While urgent, these tasks don't necessarily require your expertise. Can that report be handled by your assistant? Free yourself to focus on higher-level priorities by delegating these activities.

- **Eliminate (Not Urgent & Not Important):** Be ruthless! Social media scrolling, aimless phone calls, or busywork fall under this category. These tasks drain your time and energy without yielding any real benefit. Eliminate them from your life.

Putting the Matrix into Action

Now that you understand the framework, here's how to leverage its power:

1. **Brainstorm:** List everything on your mind, from work projects to personal errands. Be exhaustive!
2. **Categorize:** Ruthlessly evaluate each task. Is it urgent? Is it important? Place it in its corresponding quadrant.
3. **Take Action:** Based on the quadrant, assign a clear action. Schedule important but not urgent tasks for dedicated time slots. Delegate what you can. Eliminate the rest.

Tips for Mastering the Matrix

- **Review Regularly:** Your priorities will shift. Revisit your matrix weekly to ensure it reflects your current needs.
- **Set Realistic Deadlines:** Don't overload the "Do First" quadrant. Prioritize within each category.
- **Embrace "No":** Learning to say no to unimportant requests frees up time for what truly matters.

The Eisenhower Matrix is a simple yet powerful tool. By embracing its principles and prioritizing ruthlessly, you can transform your to-do list from a source of stress into a roadmap to achievement. So, grab a pen and paper, unleash the power of the matrix, and watch your productivity soar.

Now, let's explore the **Pareto Principle,** better known as the 80/20 rule. This principle states that 80% of your achievements result from just 20% of your efforts. By identifying and focusing on that high-impact 20%, you can drive your business to new heights of success.

My Journey to Increased Productivity

As I navigated my journey from real estate agent to team leader to business owner and entrepreneur, I grappled with each role's evolving challenges. As a high-performing agent, I meticulously planned my time for prospecting, showcasing homes, and closing deals.

Stepping up as a team leader required me to focus on strategy, coaching, and business development. The 80/20 rule was my lighthouse, guiding me to identify the vital 20% driving 80% of our success

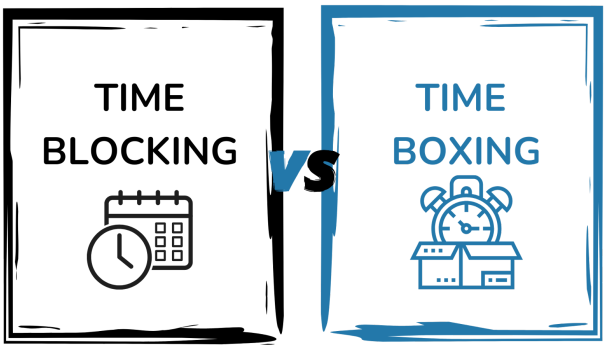
.My journey from real estate agent to entrepreneur wasn't a straight shot. Each new role brought a fresh set of challenges. As a top agent, I thrived on meticulous time management, juggling prospecting, showing properties, and sealing deals. But when I rose to team leader, my focus shifted dramatically. Strategy, coaching, and business development became paramount. The 80/20 rule was a game-changer, helping me pinpoint the key 20% of actions that drove 80% of our team's results.

This newfound focus on efficiency became a cornerstone of my approach. Owning my own business demanded an even broader skill set. While the thrill of closing deals remained, I now wore many hats – marketer, financial analyst, and even tech support guy on occasion! The Eisenhower Matrix became my new weapon of choice. By ruthlessly prioritizing tasks based on urgency and importance, I learned to delegate effectively and ensure the most critical aspects of the business never got lost in the daily shuffle. This journey has been a continuous learning process, but with each new tool and strategy, I've gained a deeper understanding of how to work smarter, not just harder.

“Time is the most precious resource that we have. It is finite, non-renewable, and cannot be saved. How we choose to spend it defines our success." - Jim Rohn.

Step-by-Step Process: Time Blocking vs. Time Boxing

This guide clarifies the differences between Time Blocking and Time Boxing, helping you choose the right technique for your needs.



Step 1: Understand the Techniques

- **Time Blocking:**
  - Divide your workday into specific time blocks dedicated to particular tasks or projects.
  - Offers uninterrupted focus on well-defined tasks with clear endpoints.
- **Time Boxing:**
  - Allocate a fixed amount of time (the "box") to each task, regardless of completion.
  - Encourages progress over perfection and combats procrastination.

Step 2: Choose Your Technique

- **Use Time Blocking when:**
  - You need focused work on well-defined, high-priority tasks.
  - Uninterrupted attention is crucial for task completion.
- **Use Time Boxing when:**
  - Tasks are complex or overwhelming.
  - Procrastination or perfectionism is a concern.
  - Managing large projects or forming new habits.

Step 3: Implement Time Blocking (Optional)

1. **List Your Tasks:** Identify all the tasks you need to accomplish for the day.
2. **Estimate Durations:** Allocate realistic time estimates for each task.

3. **Schedule Your Blocks:** Block off time slots in your calendar for each task based on their durations.
4. **Stick to the Schedule:** Minimize distractions and interruptions during each block.

Step 4: Implement Time Boxing (Optional)

1. **Break Down Projects/Habits:** Segment large projects into smaller, manageable tasks or break down habit formation into smaller actions.
2. **Assign Time Boxes:** Allocate a fixed time limit (e.g., 25-50 minutes) to each sub-task or habit action.
3. **Schedule Time Boxes:** Plan your Time Boxes throughout the day or week for consistency.
4. **Focus and Stay Within:** During each Time Box, focus solely on the designated task and avoid distractions.
5. **Reflect and Adjust:** Evaluate your progress at the end of each Time Box. Adjust Time Boxes or tasks as needed.

Step 5: Combine for Maximum Impact

Both techniques can be used together. Mastering the art of switching between them allows you to optimize time management for different tasks and situations.

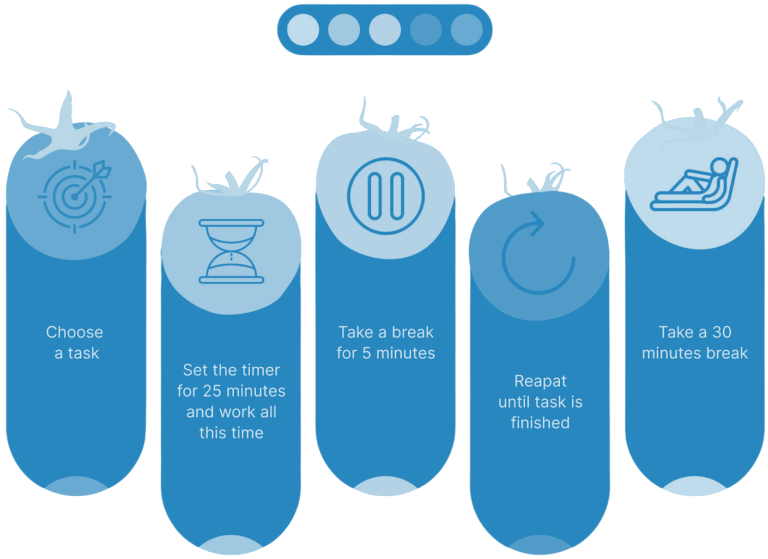
Remember:

- Experiment with both Time Blocking and Time Boxing to see which works best for you.
- The key is to find a system that enhances your focus, productivity, and helps you achieve your goals.

The Pomodoro Technique: A Complete Guide

Francesco Cirillo developed the Pomodoro Technique in the late 1980s. As a university student, Cirillo was struggling with time management and procrastination. His solution was to use a tomato-shaped kitchen timer (pomodoro is Italian for tomato) to structure his study time.

The concept is deceptively simple: break your work into intervals of focused work time, separated by short breaks. This method combats mental fatigue during long work periods, enhancing productivity and focus.



Here's how to implement it:

Step 1: Gather Your Supplies

- **Timer:** Use a kitchen timer, phone app, or online timer set for 25 minutes.
- **To-Do List:** Have a list of tasks you want to accomplish. Prioritize if needed.
- **Paper and Pen (Optional):** Take notes or track progress during breaks (optional).

Step 2: Choose Your Task

- Select the task you want to focus on from your to-do list. Ideally, break down large projects into smaller, more manageable chunks.

Step 3: Set the Pomodoro Timer

- Set your timer for 25 minutes. This is your "work interval" where you'll focus solely on the chosen task.

Step 4: Work with Laser Focus

- Eliminate distractions. Silence your phone, close unnecessary browser tabs, and inform others you need uninterrupted time.
- Dedicate your entire focus to the task at hand during the 25-minute interval.

Step 5: The Pomodoro Rings! - Take a Short Break (5 Minutes)

- When the timer rings, celebrate a completed Pomodoro! Take a short break (ideally 5 minutes) to refresh your mind and body.
- Get up, move around, stretch, grab a healthy snack, or do something unrelated to work.

Step 6: Rinse and Repeat (4 Pomodoros)

- Repeat steps 2-5 for four consecutive Pomodoro cycles. This constitutes a "Pomodoro session."

Step 7: Take a Longer Break (15-30 Minutes)

- After four Pomodoros, take a longer break (15-30 minutes). This allows for deeper rejuvenation and prevents burnout.

Step 8: Reflect and Reprioritize (Optional)

- During the longer break, you can review your progress, assess completed tasks, and potentially re-prioritize your to-do list for the next Pomodoro session.
- Jot down notes on any roadblocks or insights you encountered during your work intervals.

Step 9: Start Anew

- Return refreshed and ready to tackle the next task or continue with the same one, depending on your progress.

- **Be Consistent:** Use the Pomodoro Technique regularly to reap its benefits. Aim for multiple sessions throughout your workday.
- **Customize It:** While 25 minutes is standard, adjust the work interval length if needed. Experiment to find your optimal focus window.
- **Track Your Progress:** Monitor your completed Pomodoros and tasks to understand your work patterns and identify areas for improvement.
- **Minimize Multitasking:** The Pomodoro Technique thrives on focused work intervals. Avoid multitasking during work intervals.

- **Reward Yourself:** After completing a Pomodoro session, reward yourself with a small indulgence. This reinforces positive reinforcement.

By incorporating the Pomodoro Technique into your routine, you can enhance your focus, improve time management, and achieve greater productivity throughout your workday.

How to Put Your Business into HyperGrowth

Having good time management is pointless if we are not spending our time on the right things. So the first goal is to understand what we really should be focused on then develop a plan to focus on those strategies and tactics daily. When asking top agents what their days look like, the responses were very interesting to say the least. Their days looked very similar, and though their priorities were all different because they were at different places in their life, there were a few similarities that noticeably stood out:

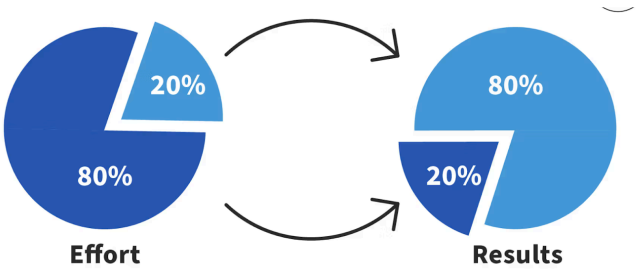
1) They had a plan each day
2) A huge part of that plan was prospecting their sphere, follow-ups, FSBO, Expireds, Internet leads
3) Time for reflection asking themselves what went well and what they could do better to be more productive the next day.
4) They were extremely disciplined in sticking to their time blocks.

How does that list stack up against your daily routines?

Now it's time to get focused and work smart. To do that you need to implement the 80/20 rule.

Step-by-Step Time Management with the 80/20 Rule (Pareto Principle)

The 80/20 rule, also known as the Pareto Principle, states that roughly 80% of your results come from 20% of your efforts. Here's a breakdown on how to use this rule for effective time management:



Step 1: Identify Your High-Impact Tasks

1. **Brainstorm Tasks:** Make a comprehensive list of all your work-related tasks and responsibilities.
2. **Analyze Importance vs. Urgency:** Evaluate each task on a scale of importance (high impact on your goals) and urgency (requires immediate attention).

- **High Importance/High Urgency:** These tasks are critical and need immediate attention (e.g., urgent deadlines, client meetings).
- **High Importance/Low Urgency:** These are the 20% high-impact tasks you should prioritize (e.g., strategic planning, core project development).
- **Low Importance/High Urgency:** These tasks may seem pressing but have minimal impact (e.g., responding to non-critical emails, attending unnecessary meetings).
- **Low Importance/Low Urgency:** These tasks can be delegated or eliminated (e.g., administrative tasks, excessive social media browsing).

Step 2: Focus on the 20%

1. **Schedule Time for High-Impact Tasks:** Block dedicated time slots in your calendar to focus solely on your high-impact tasks (identified in Step 1).
2. **Minimize Distractions:** During these time blocks, silence notifications, close unnecessary browser tabs, and inform colleagues you need focused time.
3. **Deep Work Approach:** Utilize techniques like the Pomodoro Technique (focused intervals with short breaks) to maximize productivity during your high-impact work sessions.

Step 3: Delegate or Eliminate the Rest

1. **Delegate Tasks:** Can you delegate any low-importance tasks to colleagues or outsource them if feasible? Delegation frees up your time for high-impact activities.
2. **Eliminate Unnecessary Tasks:** Are there any tasks on your list that can be eliminated altogether? Be ruthless in cutting out activities that don't contribute to your goals.

Step 4: Track and Monitor

- **Review Your Progress:** Regularly assess your progress and effectiveness in prioritizing high-impact tasks.
- **Refine Your Approach:** As your priorities or workload evolve, revisit your task list and adjust your time allocation accordingly.

Benefits of Using the 80/20 Rule for Time Management:

- **Increased Productivity:** By focusing on the 20% that matters most, you achieve more significant results in less time.
- **Reduced Stress:** By eliminating low-impact tasks, you free up mental space and reduce stress associated with feeling overwhelmed.
- **Improved Goal Achievement:** Prioritizing high-impact tasks directly contributes to achieving your goals and objectives more efficiently.

Remember: The 80/20 rule is a general guideline. The actual percentages may vary depending on your specific role and goals. The key is to identify what truly drives results and allocate your time strategically.

This is how I do my calendar:

Step 1: Make a list of the 20% of activities that will generate 80% of your results. Your 80% activities can be addressed after your 20% if you have left over time. You should not have more than 7 items on your list that fall within your 20% activities.

Step 2: Plan How much time you're going to delegate to each task then schedule those tasks in your calendar. If one or more of the items on your list is too big to accomplish in one day, then write down how much time during that day you will dedicate to it. You will take care of bigger projects in manageable chunks of time. ***You will be surprised at how many important things you can get done with this strategy.*** A good example is this Mastery Course. I time blocked an hour each day at a minimum to work on this and slowly but surely it came together. That's also how I wrote my first book, "Driven" That ended up becoming an amazon.com best seller. So don't put off big projects because you think you don't have enough time. Time Block them!

Step 3: Plan the day in your calendar. Note in the example of a fully planned day below that there are two periods of time for miscellaneous and got-a-minute meetings. These periods are absolutely essential because we all know that our day might be interrupted. There are some unexpected things you will have to react to that will throw you off. ***Top producers all recommended setting aside at least 2.5 hours a day for prospecting, uninterrupted.***

Step 4: Ask yourself: Is there anything on this list that I can delegate or outsource to someone else to free me up to spend more time on my higher priorities?

So as you can see there is not a thousand steps to time management, it's a handful of simple steps each day. Master these steps and you won't believe the difference. Implement them with your team and you will be operating at maximum productivity before you know it.

Of course, even if you stick to these steps, events and people will interfere and your schedule will be disrupted. As long as you schedule some flex time into your day, you can ***ACCOMMODATE THOSE DETOURS. THE KEY IS THAT WHEN SOMETHING INTERFERES*** with your schedule, deal with it and then go back to your schedule!

Daily Breakdown with Integrated Activities (Shorter Monday Meeting & Sales Focus)

This revised schedule incorporates personal development, working out, and dedicated focus on sales activities on Monday into your morning routine:

Every Day:

- 6:00 AM - 7:00 AM: **Personal Development/Spiritual Growth** (Meditation, journaling, reading, etc.) daily preparation
- 7:00 AM - 8:00 AM: **Workout** (Exercise routine)
- 9:00 PM - 10:00 PM: Next Day Prep & Projects **Financial & Metrics Review** (Review key financial data, KPIs, etc.

Monday:

- 8:00 AM - 8:30 AM: Sales Team Meeting
- 8:30 AM - 12:00 PM: Prospecting & Follow Up (Sales Focus) with additional sales activities (e.g., sales calls, proposals)
- 1:00 PM - 2:00 PM: Marketing
- 2:00 PM - 5:00 PM: Appointments
- Flex time for personal and other Business needs

Tuesday:

- 8:00 AM - 9:00 AM: Team Meeting (All departments)
- 9:00 AM - 10:00 AM: Marketing Meeting
- 10:00 AM - 12:00 PM: Prospecting & Follow Up
- 1:00 PM - 2:00 PM: Marketing
- 2:00 PM - 5:00 PM: Appointments
- Flex time for personal and other Business needs

Wednesday:

- 8:00 AM - 9:00 AM: Team Meeting (All departments)
- 9:00 AM - 10:00 AM: Service Meeting
- 10:00 AM - 12:00 PM: Prospecting & Follow Up
- 1:00 PM - 2:00 PM: Marketing
- 2:00 PM - 5:00 PM: Appointments
- Flex time for personal and other Business needs

Thursday:

- 8:00 AM - 9:00 AM: Team Meeting (All departments)
- 9:00 AM - 10:00 AM: Tech Meeting
- 10:00 AM - 12:00 PM: Prospecting & Follow Up
- 1:00 PM - 2:00 PM: Marketing
- 2:00 PM - 5:00 PM: Appointments
- Flex time for personal and other Business needs

Friday:

- 8:00 AM - 9:00 AM: Team Meeting (All departments)
- 9:00 AM - 10:00 AM: Leadership Meeting
- 10:00 AM - 12:00 PM: Prospecting & Follow Up
- 1:00 PM - 2:00 PM: Marketing
- 2:00 PM - 5:00 PM: Appointments
- Flex time for personal and other Business needs

Saturday:

- 6:00 AM - 8:00 AM (Flexible): Morning Routine or additional work time (optional)
- 3:00 PM - 8:00 PM: Content Creation & Meetings

Sunday: (Rest and Relaxation)

This schedule provides a dedicated focus on sales activities on Monday while maintaining team meetings for collaboration throughout the week. You can further customize the "Prospecting & Follow Up" block on Monday to include specific sales tasks. Remember, you can adjust the timings within the blocks based on your specific needs and meeting durations.

Until you get in the habit of sticking to your schedule as consistently as possible, make sure you have a list of non-negotiables you get done everyday.

If you don’t develop the skill set and discipline of time blocking and following through on the most important parts of your day and teaching your team to do the same thing. Your goals may be nothing more than a fantasy.

Go to the operations section in the ren growth ceo resource resource page for the time management exercise Also go to the A.I. Tools and Services section and check out the recommended tools we use to increase productivity**.** **A.I. tools and services**

- The 12 week Year - Brian P.Moran
- Finish what you start - Peter Hollins
- Atomic Habits - James Clear
- The Neuroscience of Focus **-** Andrew Huminton
- Deep Work - Cal Newport
- The 80/20 Ceo- Bill Canady
- REN Success System/ Growth CEO - Resources

1. **Use REN AI Assistant to make sure you're scheduling daily time blocks for your top 20% high-impact activities (e.g., prospecting, follow-ups, lead generation).**

2. **Use REN AI Assistant to analyze your workload and identify high-priority tasks based on their potential ROI.**

3. **Break down complex projects into smaller tasks and allocate fixed "time boxes" (25-50 minutes). This includes Pomodoro-style work sessions.**

4. **Delegate low-priority tasks (like admin work or repetitive follow-ups) to REN 360's AI-powered tools, freeing up your time to focus on income-generating activities.**

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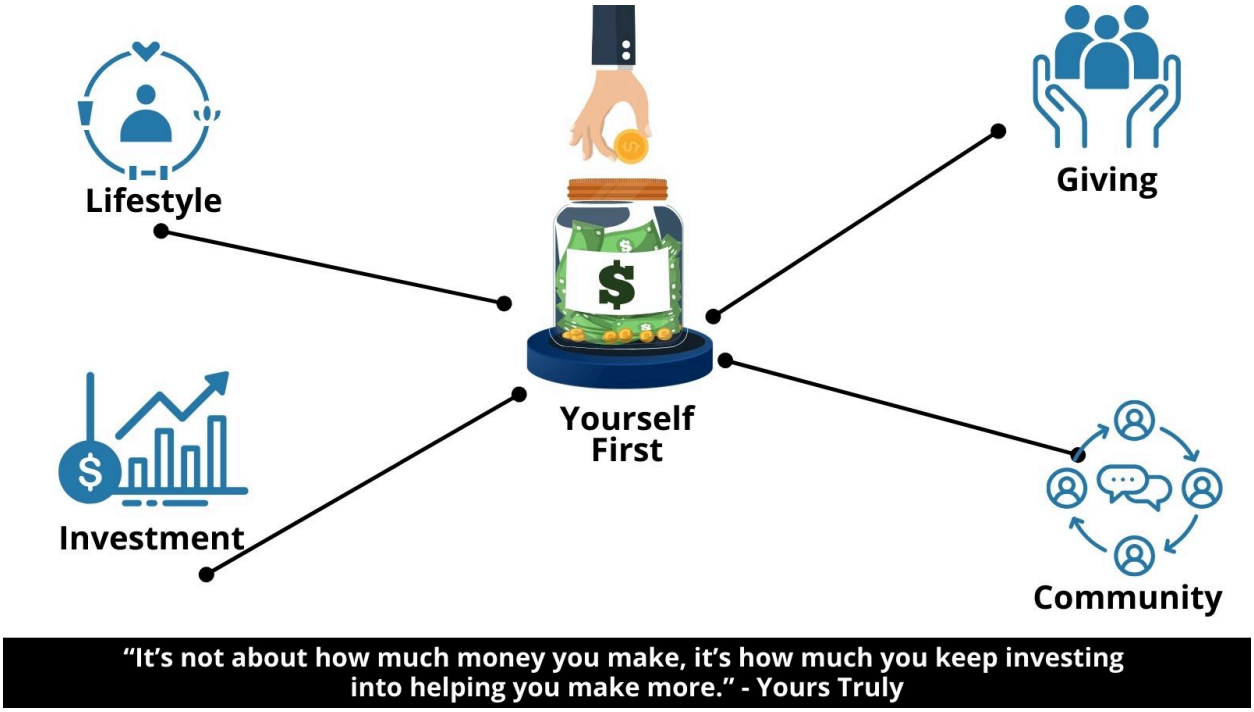
CHAPTER 36

Money Secrets

CHAPTER 36: Money Secrets

"It's not about how much money you make, it's how much you keep investing into helping you make more." - Isaiah Colton

In this section, you will learn about managing money so you can not just build a business but also build a profitable business that helps you find the balance between living a great life and still having enough to keep the business growing without overleveraging yourself and risking your future. Let's break down a proven system to gain financial independence and become a multinational over time.



The Strategy

At the core of money secrets is the idea that you should pay yourself first instead of last. Then every quarter take 50% of what you've saved and invested into creating more wealth. When you pay yourself, have a very clear standard of how much money to spend to live the lifestyle you want, give back to the community, and invest in growing your business and overall wealth. Learning the secrets of how money works and taking action on your own plan is the difference between having some financial success and becoming a millionaire.

Made popular by the book “Profit First” by Mike Michalowicz, this concept teaches that businesses should allocate a portion of their revenue for profit before anything else. Instead of profit being what’s left over after expenses, it becomes a priority from the start. With strong conviction, you commit to taking a percentage of those profits as owner earnings or investing them into other streams of income.

Now, I know what you're thinking: it’s easier said than done. Maybe you have a strained relationship with money, or your current business or life situation makes this goal seem impossible. I thought that too. However, what I discovered is that with the right mindset about money and implementing the right money system, achieving this is possible regardless of your circumstances. I am a living example of it

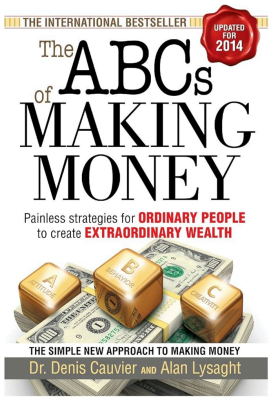
My Story About Money

I grew up in borderline poverty. My dad was a hard worker but was always in a situation where we had just enough to get by. Sometimes we did not have enough money for the basics to have milk for my cereal, and government powdered eggs were my go to for breakfast when things got tight. It was not an ideal situation, to say the least. **I learned that at a young age, if I was going to get what I wanted out of life, I was going to have to earn it for myself. Nobody was going to give it to me.**

By 16, I had a lawn mowing business, worked side jobs on the weekends, and still did three sports in high school. So I started to make some money, but I had no ideas how to manage it and it seemed even at a young age, there were always more things I could spend on it than what I could bring in. The same trend continued in college; I went to school full time but still worked.

Then one day I decided to join a network marketing business reselling telecom services, and I did that out of my dorm. I started making good money, and I increased my lifestyle with it. Eventually, I developed a set of skills where I got amazing at selling while also teaching other people how to sell. I knew marketing and sales were my niche so I went all in. I went to work after college to help various companies build their inside sales teams, and I have never made less than six figures since I was 24 years old.

But my bank account did reflect that. I ended up spending more than I made every year on credit card debt, and with the goal of trying to find the right “girl” and start a family soon, things were not looking good. Then I came across this book that I was recommended to at an event called “**The ABC’s of Making Money." That book changed how I thought about money forever. I had this idea that building wealth had to be**



complicated or that I had to make a certain amount of money before I could start focusing on building wealth. The book blew away all my limiting beliefs and gave me a clear, simple path. Just to be safe, I went out and bought every book I thought interesting on the topic of money, and it was the same basic principles that kept coming up.

Shortly after reading the book, I made a plan. The first step in the plan was to find something where I could make as much upside as possible that matched my skill sets. **Then what I committed to doing was never spending more than 90% of my total income after taxes, with the goal of paying my bills down, increasing my revenue over time, and getting that to 70% spending, then 60% spending.** I made it a competition to see not only how much money I could make but also how much I could keep while still living the life I wanted.

I lived well, but I did my best to never compromise my standards. Then, after I got my debt under control, I had 3 months of savings in my banking account. I took my extra cash flow and invested it in stocks, real estate, and other miscellaneous business ideas I found interesting along the way. **Again, it was not a goal; it was a standard. I found really amazing software to help me track my progress, and the technology changed the game. Some things I lost money on, some I made money on, but it was all in the budget, so regardless of what was happening, it was accounted for.** This allowed me to make educated decisions, and while it was far from a perfect journey, by the time I was 28 years old, I was a millionaire in 5 years following this formula.

A significant part of becoming a millionaire is finding the right vehicle. I believed real estate was that vehicle for me, so my partners and I launched an independent brokerage and instituted a referral program where agents paid us a fee for leads outside our brokerage. The business showed immense promise but needed capital. After raising some funds and investing my own money, we hit the ground running.

I applied the same financial model I use personally: I informed the team of our resources and budget constraints, stressing the necessity of making it work. Initially, achieving our goal of setting aside 10% of cash flow seemed impossible due to limited revenue and rapid growth. However, through creativity and meeting revenue targets, we eventually managed to consistently save that 10%. **By year two, we saw substantial profit, reaching high six figures by year three, and achieving our first seven-figure profit by year five after paying ourselves.** The company's valuation was four times its revenue, making me a multimillionaire.

We replicate this formula in every business venture, adjusting the numbers slightly, which allows us to live well and accumulate significant wealth over time. The secret to my financial success has been identifying vehicles aligned with skills and passions, maximizing earnings, and developing a comprehensive financial plan for both personal and business use. Reinvesting profits into other ventures that generate passive income has transformed my family's financial future for generations.

What's particularly exciting is seeing my son adopt a similar approach. At a young age, he started a recycling business and engaged in online selling to generate income. He saves 30% for his business, 30% for future personal expenses like a car, allocates 30% to investments in stocks, Bitcoin, and life insurance, and dedicates 10% to charitable causes he supports, including church donations and charities. Even at 12 years old, he manages his finances responsibly, with investments in whole life insurance, setting him up for significant tax-free income by his 30s. **If my 12-year-old son can succeed with this plan, so can you.**

Now, I know you might have a lot of questions, like what should my budget look like, how much should I start saving, and how do I make sure I follow through? This is what I would do if I were you. Even if you don’t own a business right now, you need to apply this to your personal life. **How you run your personal finances is almost always a reflection of how you will run your business finances.**

Your very first step should be to let your financial advisor, CPA, and legal advisor know what you are trying to do. They will give you the best advice. You can also use your AI assistant, and it will be able to give you guidance along the way of working with professionals. Listed below are the steps that I took to help get you started in the right direction.

Tactical Execution

Implementing the "Profit First" system in your business and personal life involves a structured approach to managing finances, focusing on prioritization of profit, and efficient allocation of resources. Here's how to systematically apply the "Profit First" methodology:

Step 1: Read "Profit First"
Start by reading "Profit First" by Mike Michalowicz to thoroughly understand the system and its underlying principles.

Step 2: Assess Your Current Financial Situation
Review your business's current financial status, including income, expenses, and profit margins.

Step 3: Set Up Separate Bank Accounts
Open multiple bank accounts for different purposes, For our personal and business accounts we have a spending account, savings account, investing account, and giving account. Each week we take the % designated to go into each account and move it.

Step 4: Determine Your Target Profit Percentage
Decide on the percentage of revenue you want to allocate to profit. Begin with a modest percentage and plan to increase it over time. When it's personal or business, we have a % of positive cashflow that we commit to. It started out small and as our cash flow increased we increased the %. Even 1% is better than not. It's the habit that's more important than the amount in the beginning.

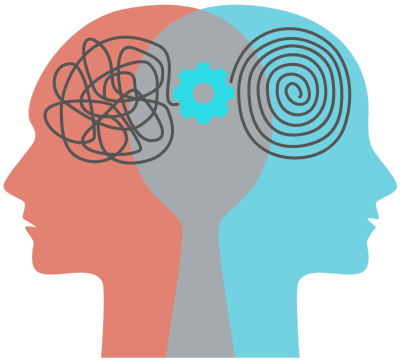
Step 5: Allocate Funds Regularly
On a predetermined schedule (one time a week, twice a month or monthly), allocate a percentage of your revenue to each bank account according to the "Profit First" formula, prioritizing profit. 1) Owners Income 2) Taxes, 3) Profits 4) % of profit going back into the business (suggested 50%)

Step 6: Cut Unnecessary Expenses
Analyze your expenses and eliminate any unnecessary or wasteful spending to increase your profit allocation. Almost every Saturday morning I sit down with our family and go over our finances along with our entire wheel of life and look over what's going well and what needs to be worked out.

Step 7: Monitor Your Cash Flow
Keep a close eye on your cash flow to ensure you have enough liquidity to cover expenses and allocate to profit. I promise that your spending money right now that will not change your lifestyle or the results in your business, that's a nicety and with a little creativity and being smarter with your money, you can decrease your overhead, free up cash flow and still have the same quality of life and business work experience in the meantime.

Step 8: Regularly Assess Your Financial Health
Schedule regular financial assessments to review your adherence to your profit allocation plan and make adjustments as needed with each part of your business with each one of your leaders in marketing, sales, service, tech, and operations to make sure they are managing their budget correctly. Give them incentives to treat your money like their own.

Step 9: Embrace Behavioral Changes
Adopt the behavioral changes recommended in the book, such as the "small plates" philosophy and eliminating Parkinson's Law.



Step 10: Cultivate a Savings Mindset
Develop a savings mindset by consistently setting aside money for profit, building a financial cushion for your business. For the record I don't believe in saving to have a pile of cash in my bank account. Actually the opposite, I

try to stay broke. Meaning I try to keep the money moving to make more wealth. Except for 3 months of savings in our personal and business we focus on keeping our money moving and staying within a good debt to income reaction. This allows us to use a combination of cash and debt to build, build and build.

Step 11: Separate Personal and Business Finances
Ensure a clear distinction between your personal and business finances with separate bank accounts for each.

Step 12: Determine Your Personal Profit Percentage
Apply the "Profit First" principle to your personal finances by deciding on a percentage of your income to allocate to personal savings and financial goals.

Step 13: Set Up Personal Bank Accounts
Create separate personal bank accounts for savings, daily expenses, taxes, and personal enjoyment.

Step 14: Allocate Personal Income
Regularly allocate a portion of your income to each of your personal bank accounts according to your predetermined percentages.

Step 15: Prioritize Savings
Focus on saving for long-term financial goals, emergency funds, retirement, and personal enjoyment, similar to how you prioritize profit in your business.

Step 16: Monitor and Adjust
Continuously monitor your personal financial health and adjust as necessary to achieve your financial goals.

Step 17: Stay Disciplined
Maintain the discipline and behavioral changes recommended in "Profit First" to ensure your personal finances align with your goals.

Step 18: Educate Yourself
Dedicate time to enhancing your financial education to improve your personal financial management skills

.Understanding and managing risks is crucial. Assess potential business risks, like market downturns, agent attrition, or unexpected expenses, and prepare contingency plans. This proactive approach helps ensure you're prepared for various scenarios, protecting both your business and personal finances through wise and resourceful money management.

Here's an Example Budget for a Small Business

Commission income (GCI) of $250,000, using the Profit First methodology. The allocation is as follows:

- Revenue: $250,000
- Profit (10%): $25,000
- Owner's Compensation (30%): $75,000
- Taxes (15%): $37,500
- Operating Expenses: $112,500

Breaking down the operating Expenses into specific categories according to your specified percentages:

- Marketing (10% of Operating Expenses): $11,250
- Inside Sales (20% of Operating Expenses): $22,500
- Service (10% of Operating Expenses): $11,250
- Technology (10% of Operating Expenses): $11,250
- Operations (remaining 50% of Operating Expenses): $56,250

In this scenario, your yearly take-home pay (owner's compensation) would be $75,000, or about $6,250 monthly. The allocation percentages are a guide that you can adjust based on business needs and priorities. In the Profit First method, the idea is to prioritize savings and essential expenses before spending on discretionary items.

Here's a possible allocation:

Income: $6,250
First, allocate income for savings and essential expenses, and the remainder for discretionary expenditures.

- Savings 20% ($1,250): This goes into your savings account for future investments or a rainy-day fund.
- Essential Expenses 50% ($3,125): This covers all necessary costs like housing, utilities, and food.

- Personal Expenses 30% ($1,875): This includes health, transportation, and discretionary spending.

The breakdown could look like this:
- Housing (60% of essential expenses): $1,875
- Utilities and Bills (20% of essential expenses): $625
- Food (20% of essential expenses): $625
- Health (20% of personal expenses): $375
- Transportation (30% of personal expenses): $562.5
- Personal and Discretionary Spending (50% of personal expenses): $937.5

Remember, you can adjust these percentages based on your personal needs and priorities. The key to the "profit first" method is to prioritize savings and essential costs before considering personal and discretionary expenses. This simple shift can have a profound impact on your personal financial health.

Now let’s do it at $1,000,000 GCI or revenue, and if you're already at $1,000,000, your eyes will be open to what your budget should look like.

Business Budget

Revenue: $1,000,000
Allocation for profit, owner's compensation, and taxes:
- Profit (20%): $200,000
- Owner's Compensation (25%): $250,000
- Taxes (15%): $150,000
- The remaining balance is for operating Expenses: $400,000

Breakdown of Operating Expenses (based on averages from top-performing teams):
- Broker Fees: $20,000
- Marketing (10% of operating expenses): $40,000
- Inside Sales (20% of operating expenses): $80,000
- Service (15% of operating expenses): $60,000
- Technology (10% of operating expenses): $40,000
- Operations (45% of operating expenses): $180,000

In this scenario, your yearly take-home pay (owner's compensation) would be $250,000, or about $20,833 monthly.

As long as you control your personal spending, you can start making enough money to invest in wealth creation and still live a good life in most areas of the country and the world.

Personal Budget

Assuming a monthly personal income of $20,833, here's a potential budget allocation using the Profit First method:

Income: $20,833
From the income, you first allocate it for savings and essential expenses. The remaining amount is for discretionary expenses

- Savings (20%): $4,167
- Essential Expenses (50%): $10,416
- Personal Expenses (30%): $6,250

The breakdown could look like this:

- Housing (35% of essential expenses): $3,646
- Utilities and Bills (15% of essential expenses): $1,562
- Food (25% of essential expenses): $2,604
- Insurance (25% of essential expenses): $2,604
- Health (15% of personal expenses): $938
- Transport (20% of personal expenses): $1,250
- Personal and Discretionary Spending (65% of personal expenses): $4,062

Here are a couple really important things to remember:

- Don't Neglect Your Personal Finances: Remember, the purpose is financial freedom. Ensure you're budgeting and managing your personal finances responsibly, mirroring the Profit First principles.
- Don't Overlook Expenses: Focusing only on revenue and profit can be tempting, but scrutinizing expenses is vital. You'll be amazed at how costs can be trimmed without hurting the business.
- Don't Be Impulsive: Resist the urge to spend profits carelessly. Treat your business like an investment portfolio. Just as you wouldn't hastily pull out all your stocks, don't withdraw all your profits immediately.
- Don't get Complacent: Regularly review your finances. As the business grows, your Profit First percentages may need to adjust.

- Don't Give Up Too Soon: Implementing Profit First can feel uncomfortable initially. Stay the course. Remember, it's a marathon, not a sprint.

By following these guidelines, you're not just dreaming of financial freedom - you're living it! It's not just about making money; it's about making your money work for you. As you turn the page to the next chapter, remember that you're not just a business owner but a wealth creator!

Generally speaking, using credit or raising capital can be a powerful tool to grow your business and give you some awesome benefits if you manage it right.

Meet with a legal counsel and a financial advisor and talk to them about the benefits of moving your business into a trust—the benefits both legally and financially of you owning nothing personally and having the trust own your assets.

If you choose to be lazy and not set up this system, it’s like walking on hot coals and thinking you won't get burned. Both will give you very negative results.

In the operation section of the REN Growth CEO resource page I give you the Ultimate Budget sheet to help you follow this strategy, I also give you a link to a simple net worth calculator for you to track the growth of your net worth month to month.

Top books about Money:

- The Psychology of Money - Organ Housel
- I will teach you to be Rich - Rmit Sethi
- Profit First -Mike Micalowcz

- The ABC of Making Money - Denis Cauvier
- The holy grail of investing, Money Master the Game, Unsakeable - Tony Robbins
- REN Success System/ Growth CEO - Resources

Disclaimer: You should always talk to a financial advisor before making important decisions. This is not meant to be specific financial advice, and all legal and financial decisions should go through a certified financial professional.

Remember, the journey to a 7-8 figure business is not a sprint but a marathon. With clear financial planning and a little help from AI tools, you'll build not just a profitable but also a sustainable and resilient business. Let's get started!

1. **Use REN AI Assistant to analyze your current business income, expenses, and profit margins. Focus on following the “Profit First” model.**

2. **Use REN AI Assistant to identify unnecessary business spending and suggest areas for cost-cutting, freeing up cash flow for profit allocation.**

3. **Use your Sales & Marketing Tracker to track cash flow and financial performance, ensuring your team leaders stay within budget.**

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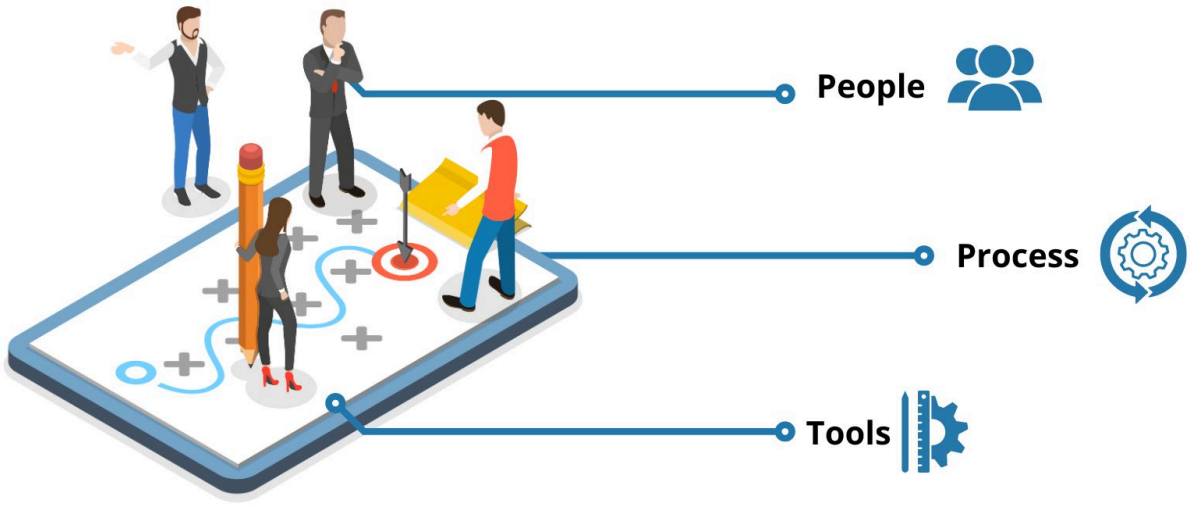
CHAPTER 37

Business Growth Secrets

CHAPTER 37: Business Growth Secrets

"If you don't design your business to run without you, you're not building a business, you're building a job." - Michael Gerber (Author, The E-Myth Revisited)

This chapter is devoted to those of you who do not want to create a high paying job, but want to develop a business that eventually can run without you and eventually lead to an exit. This all goes back to the most important consent in business and wealth creation, that is the concept of leverage.



"If you don't design your business to run without you, you're not building a business, you're building a job." - Michael Gerber

The Big Idea: Understanding Leverage

In a business context, leverage involves using resources efficiently to magnify output. It's not about working harder; it's about working smarter. You make every action count through leverage and ensure it brings you closer to your goals. The elements you leverage in your business are:

People: You need the write people, with the write mindset, with the write training.

Process: Having repeatable, efficient processes is crucial. Processes streamline operations, minimize errors, and ensure consistent quality. They make your business predictable, scalable, and manageable.

Tools: In today's digital age, various tools can automate tasks, provide valuable insights, and optimize your operations. Leveraging these tools can drastically reduce manual labor, save time, and increase accuracy.

Executions: Rigorously and with big headed persistence make sure the SOP is getting executed on. In our case, everything in the Playbook is one big SOP.

Managing People, Processes, and Tools for Optimal Performance

Here's a breakdown of three key areas to manage within each element (People, Processes, and Tools) of a system that emphasizes mindset, activities, and skillset:

(Mindset, Activities, Skillset)

1. Mindset:
    - Cultivate a growth mindset: Encourage learning, experimentation, and embracing challenges.
    - Promote collaboration and communication: Foster teamwork, open communication, and knowledge sharing.
    - Develop a sense of ownership and accountability: Empower individuals to take ownership of their work and results.
2. Activities:
    - Align activities with individual strengths and skills: Assign tasks that utilize each person's unique capabilities.
    - Provide clear expectations and goals: Define success criteria and desired outcomes for activities.
    - Offer opportunities for continuous learning and development: Provide training programs, mentorship, and resources to help individuals improve their skills.
3. Skillset:

- Identify skill gaps: Assess individual strengths and weaknesses through evaluations and feedback.
- Develop a skill development plan: Implement training programs, workshops, and resources to address identified skill gaps.
- Recognize and reward skill development: Acknowledge and celebrate individual accomplishments in skill development.

(Flow, Performance, Standardization)

1. Flow and Efficiency:
    - Clearly define steps and procedures for activities: Create well-documented processes with minimal unnecessary steps.
    - Eliminate bottlenecks and optimize workflows: Identify and address any roadblocks that slow down progress.
    - Streamline communication and information flow: Establish clear communication channels and procedures.
2. Performance Measurement and Improvement:
    - Define metrics to track the effectiveness and efficiency of processes: Establish key performance indicators (KPIs) for process evaluation.
    - Schedule regular reviews and analysis: Conduct regular assessments to identify areas for improvement.
    - Implement continuous process improvement mechanisms: Foster a culture of ongoing process enhancement.
3. Standardization and Consistency:
    - Define "best practices" for completing tasks: Establish clear standards for how activities should be carried out.
    - Develop documentation and training materials for processes: Ensure everyone understands and follows established procedures.
    - Implement quality control measures: Maintain consistent quality in deliverables through established checkpoints.

TOOLS (Alignment, Accessibility, Integration)

1. Alignment with Activities and Skill Sets:
    - Select and implement tools that support the specific activities people perform: Tools should be chosen based on their suitability for the tasks at hand.
    - Match tools with the skillsets of users: Ensure tools are accessible and usable by those who need them.
    - Provide adequate training and resources for optimal tool utilization: Train employees on how to use tools effectively and maximize their potential.
2. Accessibility and User-Friendliness:
    - Ensure tools are easily accessible and user-friendly for everyone: Make sure tools are readily available and easy to learn and use.
    - Implement intuitive interfaces with clear instructions: Provide straightforward interfaces with minimal learning curve.
    - Offer technical support for troubleshooting: Make technical support readily available to address any user issues.
3. Integration and Automation:
    - Integrate tools seamlessly with each other for better data flow: Allow data to flow smoothly between different tools for increased efficiency.
    - Automate repetitive tasks to free up time for higher-level work: Leverage automation features to reduce manual effort and improve productivity.
    - Maintain secure data transfer and storage: Implement robust security measures to protect data transmitted and stored within tools.

By effectively managing these aspects within people, processes, and tools, you can create a well-rounded system that empowers individuals and optimizes overall performance. This approach ensures a strong foundation for continuous improvement and achieving your desired outcomes.

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CHAPTER 38

Resources

CHAPTER 38: Resources

"The journey of a thousand miles begins with a single step at a time." - Lao Tzu

The goal of this section is to give you a step-by-step outline and bring all of your action steps into one transformational playbook. This checklist goes along with the online self-guided course. The promise is if you follow this 90 Day transformation plan, your business will explode past what you ever thought possible.

The Big Idea

The problem with most books you read is that you don't actually implement what you read. Society has conditioned you to believe that acquiring knowledge leads to success, when in reality, it often just encourages more consumption. Now, don't get me wrong, there's nothing inherently bad about investing in yourself, but it shouldn't merely be to check off a box that says you've "read" another book. **The goal of this book is to drive real change, complemented by a 90-day challenge.**

In this challenge, we guide you through a step-by-step journey from conducting business the old way to embracing the new approach. While most won't fully commit to this challenge, those who do set themselves up for almost guaranteed success, provided they consistently apply the strategies taught in this book.

My First Challenge

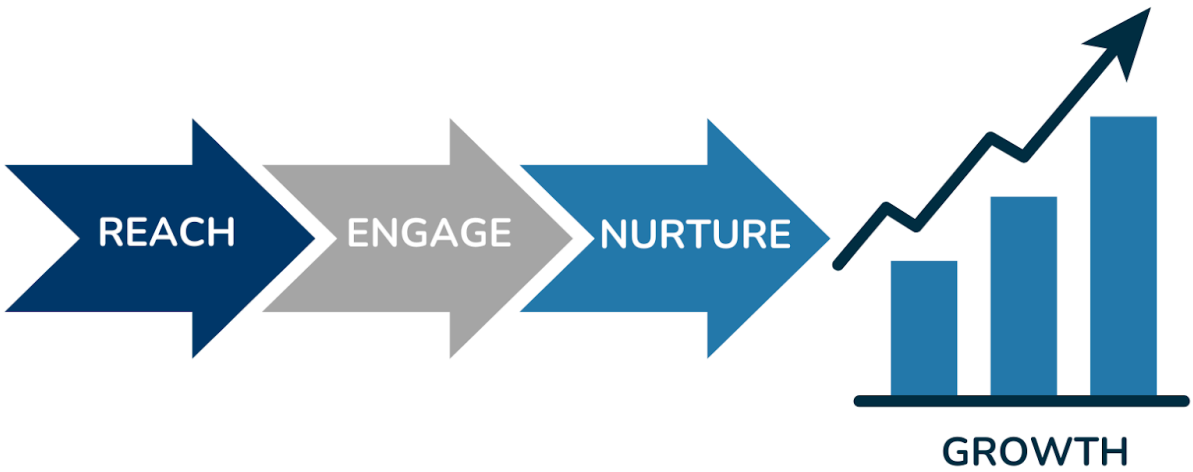
When I started my business, I faced a pressing need to quickly increase sales. Despite hiring three sales agents, they weren't following up on leads effectively like I did, which created financial challenges. Unsure of what to do next, I encountered a real estate coach promoting a '30 listings in 90 days' challenge. Inspired, I gathered my team, and together, we committed to achieving 20 listings. It marked a significant breakthrough for us.

Since then, we've consistently maintained 20-30 listings monthly. The key? Mindset, activities, and skills, combined with a focused timeframe and a clear roadmap. I've since embraced challenges, applying them not just in business but also in my personal life to cultivate better habits. Each challenge follows a formula of SMART goal setting: setting specific goals aligned with strong reasons, establishing measurable systems, ensuring they're achievable yet challenging, relevant, timely, and crucially, having a deadline.

To help you apply this valuable information, we've developed the **AI Lead Gen and Conversion 90-Day Challenge** for your sales, marketing, service, and recruiting teams. This step-by-step process transitions your business from traditional to modern practices, complete with videos, checklists, and all necessary materials. If you're ready to embrace the challenge and successfully complete it, you'll earn recognition through our RENegade rewards program, designed to celebrate high achievers. Check it out!

A Final Note: Keep the REN Flywheel Turning

As we close this chapter, let's focus on what really drives success—consistency, strategy, and momentum. The **REN Flywheel—Reach, Engage, Nurture = Growth**—isn't just a framework; it's your blueprint for building a business that thrives and scales over time.



Here's how it works:

1. **Reach**: Get in front of the right people. Expand your audience with purpose and precision, connecting with those who matter most to your business.
2. **Engage**: Spark meaningful interactions. Create value, build trust, and connect authentically with your audience to keep them coming back.
3. **Nurture**: Deepen relationships. Provide consistent value, follow through, and show your audience that you're invested in their success as much as your own.
4. **Growth**: With the Flywheel spinning, momentum takes over. Leads become clients, clients become advocates, and your growth becomes exponential.

Reset, Refocus, and Optimize Every 90 Days

To keep the Flywheel turning at its peak, take a step back every 90 days. Use the **Business Scorecard** to evaluate your performance. This tool gives you a clear picture of what's working, what isn't, and where adjustments can make the biggest impact.

Review your results against the scorecard metrics:

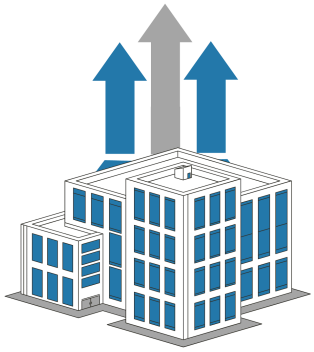
- Are you hitting your goals for lead generation and conversion?
- Is your engagement strategy driving the right outcomes?
- Are your relationships with clients and leads strengthening?

This 90-day reset is more than a checkpoint—it's your opportunity to fine-tune your strategy, pivot where necessary, and refocus your goals to ensure you're always moving forward with purpose.

The Momentum is Yours

The REN Flywheel isn't about perfection; it's about progress. Every cycle strengthens your business, sharpens your strategy, and fuels your ability to adapt in an ever-changing market. By resetting your goals and using the Business Scorecard regularly, you ensure that every spin is smarter, faster, and more effective than the last.

What's Next?



The Flywheel never stops—it evolves. Each cycle is a chance to refine, innovate, and grow. Take the time to measure, adjust, and plan your next 90 days with intention. Then dive back in with clarity, confidence, and the momentum to achieve your next breakthrough.

This is your business, your Flywheel, and your growth. With the right focus and tools, there's no limit to what you can achieve. Let's keep it turning!